DOCUMENT RESUME

ED 136 409 EA 009 329

TITLE	The Impact of the 1975-1977 UFT-Board of Education Contract on Class Size, Maximum Pupil-Teacher Ratios and the 1975-1976 Allocation Formulae. Policy Paper No. 4.
INSTITUTION	New York City Board of Education, Brooklyn, N.Y.
PUB DATE	19 Sep 75
NOTE	96p.; Prepared by the Office of the Deputy Chancellor, Educational Policy Development Unit
EDRS PRICE	MF-$0.83 HC-$4.67 Plus Postage.
DESCRIPTORS	Budgeting; *Class Size; Elementary Secondary Education; Equalization Aid; Negotiation Agreements; *Resource Allocations; Staff Utilization; State Legislation; *Student Teacher Ratio; Teacher Salaries; *Teaching Load; Urban Education
IDENTIFIERS	*New York (New York)

ABSTRACT

This paper presents the revised 1975-76 allocation of funds for instructional services and capital note items. The revisions were necessary because of the impact of the 1975-77 agreement between the city board of education and the American Federation of Teachers local on obligatory teacher staffing patterns (such as minimum pupil-teacher ratios required to hold class sizes below contractual limits). A key feature of the agreement is the requirement that teachers employed in Title I schools waive two preparation periods. Although this modification will result in more effective use of teachers, it will not obviate the drastic cutbacks in services that must be made as a result of reductions in the amount of money budgeted to instructional services. Numerous charts are included. (Author/IRT)

****
* Documents acquired by ERIC include many informal unpublished *
* materials not available from other sources. ERIC makes every effort *
* to obtain the best copy available. Nevertheless, items of marginal *
* reproducibility are often encountered and this affects the quality *
* of the microfiche and hardcopy reproductions ERIC makes available *
* via the ERIC Document Reproduction Service (EDRS). EDRS is not *
* responsible for the quality of the original document. Reproductions *
* supplied by EDRS are the best that can be made from the original. *
****

THE IMPACT OF THE 1975-1977 UFT-BOARD OF EDUCATION CONTRACT ON CLASS SIZE, MAXIMUM PUPIL-TEACHER RATIOS AND THE 1975-1976 ALLOCATION FORMULAE

ED136409

POLICY PAPER NO. 4

SEPTEMBER 19, 1975

SCOPE OF INTEREST NOTICE
The ERIC Facility has assigned this document for processing to: EA | UD
In our judgement, this document is also of interest to the clearinghouses noted to the right. Indexing should reflect their special points of view. | SP

U.S. DEPARTMENT OF HEALTH EDUCATION & WELFARE NATIONAL INSTITUTE OF EDUCATION
THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

BOARD OF EDUCATION OF THE CITY OF NEW YORK

ISAIAH E. ROBINSON, PRESIDENT
ROBERT J. CHRISTEN, VICE PRESIDENT
STEPHEN R. AIELLO
AMELIA ASHE
JOSEPH G. BARKAN
JOSEPH MONSERRAT
JAMES F. REGAN

IRVING ANKER, CHANCELLOR

PREPARED BY
OFFICE OF THE DEPUTY CHANCELLOR
EDUCATIONAL POLICY DEVELOPMENT UNIT

BERNARD R. GIFFORD, DEPUTY CHANCELLOR

EA 009 329

FOREWORD

This paper presents the revised 1975-1976 allocation of Module 2A (Instructional Services) and Module 4B (Funds for Capital Note Items) funds. The revisions in the allocation formulae used to distribute monies to the thirty-two community school districts are necessary because of the impact of the 1975-1977 agreement between the Board of Education of the City School District of the City of New York (Board) and the United Federation of Teachers, Local 2, American Federation of Teachers, AFL-CIO, (UFT) on obligatory teacher staffing patterns (i.e., minimum pupil-teacher ratios required to hold class sizes below contractual limits). Although this report supplements Policy Paper No. 3, "The 1975-1976 Allocation Formulae,"* which was issued prior to the recently completed Board-UFT negotiations, where we felt it would add to our understanding of the 1975-1977 Board-UFT agreement we repeat material originally presented in the earlier document.**

Key features of the 1975-1977 Board-UFT agreement are the requirement that teachers employed in Title I schools "waive" two preparation periods

*June 27, 1975 (plus an addendum issued on August 15, 1975).

**It should also be noted that since Policy Paper No. 3 was issued, two technical changes have been made in the allocation formula and are reflected in our analysis of the impact of the Board-UFT agreement on the 1975-1976 allocation formulae.

- A number of schools have been reclassified from Non-Title I status to Title I status.

- In order to reflect accurately the impact of the 17+ percent cut in monies for educational services, the June 1975 average salaries have been recomputed to reflect the elimination of all substitute teachers plus all regularly appointed teachers on step 1A through step 3B.

(90 minutes). The impacts of these two changes are discussed fully in Chapter II, "Impact of Workload Factors on Teacher Resource Allocation," and Chapter III, "Teacher Savings From the New Contract." Although these modifications, affecting teacher and student workloads,* will result in more effective utilization of teachers -- generating equivalent savings in excess of $50 million -- they will not obviate the drastic cutbacks in services that must be made by the thirty-two community school districts. Monies available to the districts for instructional services have been cut by more than $118 million from fiscal year 1974-1975 levels.

---

*These recommendations were originally made by a Public Employment Relations Board (PERB) Fact Finders Panel in a report issued on September 12, 1975:

> In the light of the fiscal plight of New York City, and the hard fact of what may be a prolonged teachers' strike; also bearing in mind the increased cost of living which affects school board employees as well as the public, the fact finders offer the following recommendations to resolve some of the major outstanding issues in this dispute. The fact finders offer these recommendations well aware that they may not be entirely palatable to either party but we feel that both parties can adjust to them.
>
> Therefore, the fact finders recommend as follows:
>
> ...
>
> 2. Class size shall be in accordance with levels set forth in the '72-'75 contract.
>
> 3. Teachers in Title I schools shall waive two preparation periods weekly for the term of this contract.
>
> 4. The school day shall be reduced by one period twice a week or its equivalent in time.

Although not reflected in analytical terms anywhere in this paper, the potential impact of the recently passed New York State Financial Emergency Act for the City of New York* on the day-to-day operations of the Board of Education and the thirty-two community school districts cannot be ignored. Passed as a result of the unprecedented fiscal crisis facing New York City and the possibility that the City might be forced into default during the current fiscal year, the Act provides for:

> (i) the creation of a state board with some city representation to review, control and supervise the financial management of the city, (ii) the adoption, with the approval of such board, of a plan that will provide the basis for a return of the city to sound financial condition, (iii) control by such board over the disbursement of city funds, under which debt service requirements will be met as a first priority, and (iv) review and audit of city operations by such board to assure that sound management practices are observed or restored and that operations are conducted in accordance with the plan.**

In the remainder of this foreword, key sections of this legislation have been selected and quoted at length. The language is ponderous, but the message is very important. All community school board members and community school district officers should obtain a copy of the entire Act and read it. Nothing less than the survival of decentralization as we know it is at stake.

---

*Approved at an extraordinary session of the State of New York Legislature on September 9, 1975.

**Excerpt from Section 1, Legislative Findings and Statement of Purposes.

EMERGENCY FINANCIAL CONTROL BOARD

The major instrumentality for implementing the provisions of the New York State Financial Emergency Act for the City of New York ("Financial Emergency Act") is the Emergency Financial Control Board, (EFCB) whose membership consists of the Governor (who also serves as Chairman of the EFCB), the State Comptroller, the Mayor, the City Comptroller and three members appointed by the Governor with the advice and consent of the Senate.

The powers of the EFCB are spelled out in Section 7 of the Financial Emergency Act:

> Section 7. Functions of the Board
>
> 1. In carrying out the purposes of this Act, the Board shall perform the following functions:
>
> a. As set forth in section eight, the board shall (i) determine, in connection with the development of the financial plan, estimated revenues for the city and the covered organizations,* (ii) consult with the city and the

*"Covered Organization" means any governmental agency, public authority or public benefit corporation which receives or may receive monies directly, indirectly or contingently, (other than monies received for the sale of goods or the rendering of services or the loan of monies to the city) from the city, and in any event includes, without limitation, the board of education of the city of New York the board of higher education of the city of New York, the health and hospitals corporation, the New York City Transit Authority, the New York City Housing Authority, Housing Development Corporation, City University Construction Fund, Battery Park City Authority, New York City Convention and Exhibition Center Corporation, Manhattan and Bronx surface transit operation, Staten Island Rapid Transit Operating Authority, the New York City Sports Authority and the Brooklyn Sports Center Authority ... (Section 2, sub-division 6).

covered organizations in the preparation of the financial plan, (iii) prescribe the form of the financial plan and the supporting information required in connection therewith, and (iv) exercise the rights of approval, disapproval and modification with respect to the financial plan.

b. As set forth in section nine, the board shall establish and adopt procedures with respect to the deposit of revenues of the city and the covered organizations in the fund and the disbursement of monies from the fund.

c. The board shall, from time to time and to the extent it deems necessary or desirable in order to accomplish the purposes of this act, (i) review the operations, management, efficiency and productivity of such city operations and of such covered organizations or portions thereof as the board may determine, and make reports thereon; (ii) audit compliance with the financial plan in such areas as the board may determine; (iii) recommend to the city and the covered organizations such measures relating to their operations, management, efficiency and productivity as it deems appropriate to reduce costs and improve services so as to advance the purposes of this act; and (iv) obtain information of the financial condition and needs of the city and the covered organizations. Nothing herein shall diminish the powers of the comptroller otherwise provided by law and the board may request the assistance of the comptroller in performing the above functions.

d. (i) The board shall receive from the city and covered organizations and from the special deputy comptroller, and shall review such financial statements and projections, budgetary data and information, and management reports and materials as the board deems necessary or desirable to accomplish the purposes of this act;

(ii) inspect, copy and audit such books and records of the city and the covered organizations as the board deems necessary or desirable to accomplish the purposes of this act.

e. All contracts entered into by the city or any covered organization must be consistent with the provisions of this act and must comply with the requirements of the financial plan as approved by the board. With respect to all contracts or other obligations to be entered into by the city or any covered organization after October fifteenth, nineteen hundred seventy-five, requiring the payment of funds or the incurring of costs by the city or any covered organization:

(i) Within twenty days from the effective date of this act the mayor shall present to the board proposed regulations respecting the categories and types of contracts and other obligations required to be reviewed by the board pursuant to this subdivision e. Within thirty days from the effective date of this act, the board shall approve or modify and approve such proposed regulations or promulgate its own in the event that such proposed regulations are not submitted to it within the twenty days as provided for herein. Such regulations may thereafter be modified by the board from time to time on not less than thirty days notice to the mayor and the mayor may from time to time propose modifications to the board. Unless expressly disapproved or modified by the board within thirty days from the date of submission by the mayor, any such proposed regulations or modifications shall be deemed approved by the board;

(ii) Prior to entering into any contract or other obligation subject to review of the board under its regulations, the city or any covered organization shall submit a copy of such contract or other obligation to the board accompanied by an analysis of the projected costs of such contract or other obligation and a certification that performance thereof will be in accordance with the financial plan, all in such form and with such additional information as the board may prescribe. The board shall promptly review the terms of such contract or other obligation and the supporting information in order to determine compliance with the financial plan;

(iii) The board shall, by order, disapprove any contract or other obligation reviewed by it only upon a determination that, in its judgment, the performance of such contract or other obligation would be inconsistent with the financial plan and the city or covered organization shall not enter into such contract or other obligation;

(iv) If the board approves the terms of a reviewed contract or other obligation, the city or covered organization may enter into such contract or other obligation upon the terms submitted to the board. Failure of the board to notify the city or covered organization within thirty days (or such additional time not exceeding thirty days as the board shall have notified the city or covered organization, that it requires to complete its review and analysis) after submission to it of a contract or other obligation that such contract or other obligation has been disapproved shall be deemed to constitute board approval thereof.

.....

h. The board shall issue, to the appropriate officials of the city and the covered organizations, such orders as it deems necessary to accomplish the purposes of this act, including but not limited to timely and satisfactory implementation of an approved financial plan. Any order so issued shall be binding upon the official to whom it was issued and failure to comply with such order shall subject the official to the penalties described in section eleven of this act.

DEVELOPMENT OF A FINANCIAL PLAN

The Financial Emergency Act also requires the EFCB, in conjunction with the city, to develop a financial plan for the city and the Board of Education (including, obviously, the thirty-two community school boards) for fiscal years 1975-1976, 1976-1977 and 1977-1978.

The "nuts and bolts" of the financial plan are spelled out in the act:

> Section 8. Development of the Financial Plan
>
> .....
>
> 3. The financial plan shall be developed and adopted and may from time to time be modified, in accordance with the following procedures:
>
> a. Not later than September thirtieth, nineteen hundred seventy-five, the board shall deliver to the city estimates of revenues of the city and the covered organizations for each month during which the plan is in effect.
>
> b. Based upon the revenues estimated by the board pursuant to paragraph a of this subdivision, the city shall by October fifteenth, nineteen hundred seventy-five, prepare and submit the financial plan to the board. If the board shall in its judgment, determine that such financial plan is complete and would achieve the objectives set forth in subdivision one of this section, the board shall approve the financial plan.
>
> c. The board shall disapprove the financial plan proposed by the city if, in the judgment of the board, such plan:
>
> (i) fails to provide for the payment in full of the debt service requirements on all bonds and notes of the city and the covered organizations or fails to fund adequately programs of the city and the covered organizations mandated by state or federal law;

(ii) fails to provide that operations of the city and the covered organizations will be conducted within the cash resources available according to the board's revenue estimates;

(iii) fails to achieve the objectives set forth in subdivision one of this section; or

(iv) in addition to the foregoing limitations, provides for aggregate expenditures (other than amounts required to pay debt service, pension costs, public assistance and care, and such other amounts as the board determines to be required by law) in the expense budget of the city or in the expense budget of any covered organization for any of the years during which the plan is in effect, above the level contained in the expense budget adopted by the city or by such covered organization for the fiscal year ending June thirtieth, nineteen hundred seventy-six as modified or amended to the effective date of this act. The board may, upon the request of the city, allow (a) an increase in the expense budget (other than amounts required to pay debt service, pension costs, public assistance and care, and such other amounts as the board determines to be required by law) of the city or of a covered organization for any fiscal year during the emergency period (which increase may be cumulative) equal to two percent of the expense budget (other than amounts required to pay debt service, pension costs, public assistance and care, and such other amounts as the board determines to be required by law) adopted by the city or by such covered organization for the fiscal year ending June thirtieth, nineteen hundred seventy-six as modified or amended to the effective date of this act, or (b) such further increases as the board may approve as required to meet the impact of substantial inflation after the effective date of this act, but in either case only if the board determines that increased revenues are available in an amount equal to the requested increase in expenditures.

d. In disapproving the financial plan proposed by the city the board may direct that:

(i) expenditures or reserves to assure availability of amounts required for debt service requirements on all bonds and notes of the city and the covered organizations, or expenditures required for adequate funding of programs of the city and the covered organizations mandated by state or federal law, be increased to the levels required to provide for their payment in full; or

(ii) the aggregate expenditures in any period be reduced to conform to the revenue estimates of the board prepared pursuant to paragraph a of this subdivision or to achieve the objectives set forth in subdivision one of this section.

e. In the event that the city shall, for any reason, fail to submit a financial plan, as required pursuant to paragraph b of this subdivision, or to adopt a financial plan approved by the board to be effective by October twentieth, nineteen hundred seventy-five, the board shall formulate and adopt the financial plan to be effective October twentieth, nineteen hundred seventy-five. All subsequent operations by the city or a covered organization shall be in conformance and compliance with the financial plan.

f. After the initial adoption of the financial plan, the revenue estimates prepared by the board pursuant to paragraph a of this subdivision and the financial plan shall be regularly reexamined by the board in consultation with the city and the covered organizations and the city shall provide a modified financial plan in such detail and within such time period as the board may require. Changes in such revenue estimates shall be made only by the board. In the event of reductions in such revenue estimates, or in the event the city or a covered organization shall expend funds at a rate that

would exceed the aggregate expenditure limitation for the city or covered organization prior to the expiration of the fiscal year, the city shall modify the financial plan to effect such reductions in total expenditures as may be necessary to conform to such revised revenue estimates or aggregate expenditure limitations. If within a time period specified by the board, the city fails to make such modifications after reductions in revenue estimates, or to provide a modified plan in the detail, and within such time period required by the board, the board may formulate and adopt such modifications to the financial plan, such modifications to become effective on their adoption.

g. The city may, from time to time, modify the expenditures specified in the financial plan, subject to the approval of the board. The board shall approve such modifications unless, in the judgment of the board, such modifications would constitute grounds for disapproval of the financial plan pursuant to paragraph c of this subdivision.

4. The financial plan shall be in such form and shall contain such information for each year during which the financial plan is in effect as the board may specify, shall include the city and all the covered organizations, and shall, in such detail as the board may from time to time prescribe, include statements of all estimated revenues and of all expenditures and cash flow projections of the city and each of the covered organizations.

5. The financial plan shall, except to the extent waived by the board with respect to any limited period, include any information which the board may request to satisfy itself that (i) projected employment levels, collective bargaining agreements and other action relating to employee costs, capital construction and such other matters as the board may specify, are consistent with the provisions made for such obligations in the financial plan, (ii) the city and the covered organizations are taking whatever action is necessary with respect to programs mandated by state and federal law to ensure that expenditures for such programs are limited to and covered by the expenditures stated in the financial plan, and (iii) adequate reserves are provided to maintain essential programs in the event revenues have been overestimated or expenditures underestimated for any period.

6. The covered organizations shall submit to the city and the board such information with respect to their proposed expenditures and revenues for each year during which the financial plan is in effect as the city or the board shall determine, for inclusion in the financial plan proposed by the city. Notwithstanding any other provision of law limiting the authority of the city with respect to any covered organization, the city, in the preparation and submission of the financial plan and modifications thereof, shall (except for debt service or for other expenditures to the extent that such expenditures are required by law) have the power to determine the aggregate expenditures to be allocated to any covered organization in the financial plan and any modifications thereto.

WAGE FREEZE

The Financial Emergency Act also imposes a wage freeze:

Section 10. Wage Freeze

1. Increases in salary or wages of employees of the city and employees of covered organizations which have taken effect since June thirtieth, nineteen hundred seventy-five or which will take effect after that date pursuant to collective bargaining agreements or other analogous contracts, now in existence or hereafter entered into, requiring such salary increases as of July first, nineteen hundred seventy-five or as of any date thereafter are hereby suspended. All increased payments for holiday and vacation differentials, shift differentials, salary adjustments according to plan and step-ups or increments for employees of the city and employees of covered organizations which have taken effect since June thirtieth, nineteen hundred seventy-five or which will take effect after that date pursuant to collective bargaining agreements or other analogous contracts requiring such increased payments as of July first, nineteen hundred seventy-five as of any date thereafter are hereby, in the same manner, suspended. For the purposes of computing the pension base of retirement allowances, the suspended salary or wage increases and the suspended other payments shall not be considered as part of compensation or final compensation or of annual salary earned or earnable. The suspensions provided herein shall be effective for the first pay period ending on or subsequent to September first, nineteen hundred seventy-five and shall continue until one year thereafter and, to the extent of any determination of the board that a continuation of such suspensions, to a date specified by the board, is necessary in order to achieve the objectives of the financial plan, such suspensions shall be continued to the date specified by such board, which date shall in no event be later than the end of the emergency period.

2. This section shall not be applicable to employees of the city or employees of a covered organization covered by a collective bargaining agreement or an employee of the city or a covered organization not covered by a collective bargaining agreement where the collective bargaining representative or such unrepresented employee has agreed to a deferment of salary or wage increase, by an instrument in

writing which has been certified by the mayor on or before September first, nineteen hundred seventy-five, or certified by the board after September first, nineteen hundred seventy-five as being an acceptable and appropriate contribution toward alleviating the fiscal crisis of the city. The board may, if it finds that the fiscal crisis has been sufficiently alleviated or for any other appropriate reason, direct that the suspensions of salary or wage increases or suspensions of other increased payments shall, in whole or in part, be terminated.

PENALTIES FOR VIOLATIONS OF ACT

As even a casual reading will show, the Financial Emergency Act is quite comprehensive. It is also tough on those who violate the law by spending more monies than are available:

Section 11. Prohibitions; Penalties

1. During the emergency period (i) no officer or employee of the city or of any of the covered organizations shall make or authorize an obligation or other liability in excess of the amount available therefor under the financial plan as then in effect; (ii) no officer or employee of the city or of any of the covered organizations shall involve the city or any of the covered organizations in any contract or other obligation or liability for the payment of money for any purpose required to be approved by the board unless such contract has been so approved or deemed to be approved as provided in paragraph e of the subdivision one of section seven and unless such contract or obligation or liability is in compliance with the financial plan as then in effect.

2. No officer or employee of the city or any of the covered organizations shall take any action in violation of any valid order of the board or shall fail or refuse to take any action required by any such order or shall

prepare, present or certify any information (including any projections or estimates) or report for the board or any of its agents that is false or misleading, or, upon learning that any such information is false or misleading, shall fail promptly to advise the board or its agents thereof.

3. In addition to any penalty or liability under other law, any officer or employee of the city or any of the covered organizations who shall violate subdivision one or two of this section shall be subject to appropriate administrative discipline, including, when circumstances warrant, suspension from duty without pay or removal from office by order of either the governor or the mayor; and any officer or employee of the city or any of the covered organizations who shall knowingly and willfully violate subdivision one or two of this section shall, upon conviction, be guilty of a misdemeanor.

4. In the case of a violation of subdivision one or two of this section by an officer or employee of the city or any of the covered organizations, the mayor or the chief executive officer of such covered organization shall immediately report to the board all pertinent facts together with a statement of the action taken thereon.

USING EXCESS ACCRUALS

Section 4 of the Financial Emergency Act appears to authorize the Board of Education to expend excess accruals for purposes it deems relevant to its mission.

Section 4. Power of city or covered organization to determine the expenditure of available funds.

Nothing contained in this act shall be construed to limit the power of the city or a covered organization to determine, from time to time, within available funds for the city or for such covered organization, the purposes for which expenditures are to be made by the city or such covered organization and the amounts of such expenditures, consistent with the aggregate expenditures then permitted under the financial plan for the city or such covered organization.

SUMMARY

A number of recent events seriously impinge on the operation of the school system: an increase in teacher workload, a reduction in the instructional week for elementary and junior high school students, the bitter aftermath of a strike that nobody wanted, devastating budget cuts resulting in massive lay-offs of classroom teachers and support staff, and the yet to be defined role of the Emergency Financial Control Board vis-a-vis the day-to-day operations of the Board of Education. Taken separately, each of these actions is disruptive; each saps morale and hurts children. No single event is impossible to live with if taken individually. However, when these events are combined, as they are now, they represent a formidable obstacle to sound educational planning. Yet, the children of this great city must be served. We hope this document will aid in the planning of an effective educational program.

* * * * * * *

Dr. Ronald K. H. Choy joins me as junior author of this report, although I fully accept the responsibilities for any errors of fact or judgment. We received able assistant from Dr. Catherine Lyon -- Ron's boss and my Special Assistant for Educational Policy Development -- Marshall Goldman, Antoine Ector, Miriam Newman and the staff of the Office of Planning-Programming-Budgeting. The charts and graphs were executed by Jacqueline Wong. The text and tables were prepared by Madeline Romero, Carol Young and Charlotte Johnson.

BERNARD R. GIFFORD
Deputy Chancellor

CONTENTS

FOREWARD III

LIST OF TABLES xx

LIST OF FIGURES xxi

CHAPTER

I. UNIT OF APPROPRIATION 30 1

II. IMPACT OF WORKLOAD FACTORS ON TEACHER RESOURCE ALLOCATION 8

III. TEACHER SAVINGS FROM THE NEW CONTRACT 38

IV. MODULE 2: INSTRUCTIONAL SERVICES 42

V. MODULE 4B: FUNDS FOR CAPITAL NOTE ITEMS 46

VI. MODULE 5: SPECIAL PURPOSES 48

APPENDIX

A. THE ADJUSTED REGISTER 54

B. PROJECTED OCTOBER 1975 REGISTER 57

C. THE AVERAGE TEACHER SALARY 60

LIST OF TABLES

I-1. PROGRAM 30 MODULES 2

I-2. UNIT OF APPROPRIATION 30 BY MODULE, FISCAL YEAR 1975-1976 5

I-3. DISTRICT ALLOCATION BY FORMULAE, FISCAL YEAR 1975-1976 6

I-4. COMPARISON OF UNIT OF APPROPRIATION 30 BY MODULE, FISCAL YEARS 1974-1975 AND 1975-1976 7

II-1. WORKLOAD WEIGHTED REGISTER, FISCAL YEAR 1975-1976 32

II-2. BASE NUMBER OF CLASSROOM TEACHERS, FISCAL YEAR 1975-1976 35

IV-1. MODULE 2A BASIC INSTRUCTIONAL SERVICES ALLOCATION, FISCAL YEAR 1975-1976 43

IV-2. DISTRICTS AFFECTED BY 2% LIMIT ON HOLD-HARMLESS FOR MODULE 2A, FISCAL YEAR 1975-1976 44

IV-3. MODULE 2 INSTRUCTIONAL SERVICES, FISCAL YEAR 1975-1976 45

V-1. MODULE 4B CAPITAL NOTES ALLOCATION, FISCAL YEAR 1975-1976 47

VI-1. MODULE 5 SPECIAL PURPOSES, FISCAL YEAR 1975-1976 49

A-1. ADJUSTED REGISTER: OCTOBER 1974, FISCAL YEAR 1975-1976 55

A-2. REGISTER CHANGES: OCTOBER 1973 TO OCTOBER 1974 56

B-1. PROJECTED ADJUSTED REGISTER, OCTOBER 1975 58

B-2. REGISTER CHANGES: OCTOBER 1974 TO PROJECTED OCTOBER 1975 59

C-1. AVERAGE TEACHER SALARY, JUNE 1975 61

LIST OF FIGURES

II-1. DEVELOPING THE WORKLOAD WEIGHTED REGISTER 9

II-2. MAXIMUM CLASS SIZE LIMITS 11

II-3. TEACHING AND PREPARATION PERIODS PER WEEK, KINDERGARTEN AND ELEMENTARY SCHOOL, 1975-1977 CONTRACT 15

II-4. TOTAL NUMBER OF TEACHERS PER CLASS, KINDERGARTEN AND ELEMENTARY SCHOOL, 1975-1977 CONTRACT 17

II-5. TEACHING AND PREPARATION PERIODS PER WEEK, KINDERGARTEN AND ELEMENTARY SCHOOLS, 1972-1975 AND 1975-1977 CONTRACTS 18

II-6. TEACHING, PREPARATION AND ADMINISTRATIVE PERIODS PER WEEK, JUNIOR HIGH SCHOOL, 1975-1977 CONTRACT 20

II-7. TOTAL NUMBER OF TEACHERS PER CLASS JUNIOR HIGH SCHOOLS, 1975-1977 CONTRACT 22

II-8. TEACHING, PREPARATION AND ADMINISTRATIVE PERIODS PER WEEK, JUNIOR HIGH SCHOOLS, 1972-1975 AND 1975-1977 CONTRACTS 24

II-9. MAXIMUM PUPIL-TEACHER RATIO, 1972-1975 AND 1975-1977 CONTRACTS .. 26

II-10. MAXIMUM PUPIL-TEACHER RATIOS AND PERCENT OF TITLE I PUPILS, 1975-1977 CONTRACT 28

II-11. WORKLOAD WEIGHTS, 1975-1977 CONTRACT 30

I. UNIT OF APPROPRIATION 30

1. PROGRAM 30 MODULES

Funds earmarked in the Mayor's expense budget for community school districts are placed in Unit of Appropriation 30. These "Program 30" funds are then subdivided by the New York City Board of Education into several modules. Each module is a grouping of functional activities for which separate allocation formulae are utilized. The modules are:

1. Community School Boards and District Administration
2. Instructional Services
3. Continuing Education and Extended Use of School Buildings
4. New York State Textbook Law Funds and Funds for Capital Note Items
5. Special Purpose Funds and Special Purpose Reserve
6. Fringe Benefits
7. Furniture and Equipment Procurement

These modules are described in more detail in Table I-1.

In this report, we will focus on Module 2 (Instructional Services) since this is the one most affected by the 1975-1977 agreement between the Board of Education and the United Federation of Teachers. The funds in Module 2 are distributed to the thirty-two community school districts by formulae designed to insure resource equalization.

Table I-I

PROGRAM 30 MODULES

MODULE	FUNCTION AND COMPONENTS
1	COMMUNITY SCHOOL BOARDS AND DISTRICT ADMINISTRATION - Includes salaries of Executive Assistant to Community School Board, District Superintendent, District Supervising Attendance Officer, District Business Officer, Supervisor of Guidance, et al.
2	INSTRUCTIONAL SERVICES - Includes salaries of Elementary and Junior High School Teachers, Principals, Guidance Counselors, School Secretaries, School Aides, et al. Also includes replacement costs for occasional absences and medical leaves, postage and communications services, promotional and salary differentials, and intra-district awards.
3	CONTINUING EDUCATION AND EXTENDED USE OF SCHOOL BUILDINGS - Includes personnel costs of running community and recreation centers, day camps, summer swimming pools, after school centers, etc.
4A	NEW YORK STATE TEXTBOOK LAW FUNDS - Funds in the amount of $10.00 per capita for pupils in grades K-9 are provided by state.
4B	FUNDS FOR CAPITAL NOTE ITEMS - Includes funds for furniture, supplies, equipment, textbooks, and library books financed by the issuance of capital notes by the City of New York.
5A	SPECIAL PURPOSE FUNDS - Includes funds for school lunch, repair and maintenance, borough-wide music, city-wide awards, rents, and collective bargaining increases.
5B	SPECIAL PURPOSE RESERVE - Includes funds for leaves in lieu of sabbaticals, replacements for sabbatical and terminal leaves, replacements for long term medical leaves, register increases, salaries of properly excessed personnel, preparation period coverage for special education classes, overhead costs for educational parks and integration programs, one-time other than personal service costs for new schools, replacement of instructional equipment losses due to theft and vandalism, bilingual education, and legal counsel.
6	FRINGE BENEFITS - Includes funds earmarked for social security, health, welfare, pension, and other benefits for district personnel.
7	FURNITURE AND EQUIPMENT PROCUREMENT - Includes capital funds for furniture and equipment.

2. RESOURCE EQUALIZATION

An allocation strategy that attempts to compensate for differences in the purchasing power of the educational dollar among the thirty-two districts is a resource equalization strategy. The term "resources" means the value of all human and non-human inputs into education -- services of teachers, administrators, and support staff; materials and supplies, types of facilities, and so forth.

In order to insure "equal educational opportunity" each district would have to be given enough money to purchase the same mix or "package" of resources per pupil.

- The problem is that equal dollars do not buy equal resources everywhere.

For a variety of reasons, (e.g., differences in teacher salaries and in required pupil-teacher ratios) districts vary both in ease of access to resources and in the prices they must pay for resources of given quality and quantity. Since input costs are variable, it is inaccurate to say that districts are providing equal programs or equal educational opportunity when their levels of spending are the same.

- A resource equalization strategy requires that dollars be allocated unequally to compensate for interdistrict variations in cost.

This means that cost levels in each district must be measured in such a way that the necessary adjustments in purchasing power per dollar can be computed.

3. PROGRAM 30 APPROPRIATIONS

Program 30 appropriations by module for fiscal year 1975-1976 are tabulated in Table I-2. Allocations totaling $706,812,871 are made by formulae to the thirty-two community school districts from Modules 1, 2, 3, 4B, and 7 (Table I-3). Information for fiscal years 1974-1975 and 1975-1976 is compared in Table I-4. Although the tables show that the monies set aside in Module 2 decline by $80.3 million (or 10.7%), this decline from last year is only a "net" reduction. The actual cut in Program 30 appropriations is really much larger -- $118.3 million, computed on the following basis:

$752.9 million:	1974-1975 Module 2 Amount
38.0 million:	Mandatory Increases
$790.9 million:	1975-1976 Module 2 Amount Required To Maintain 1974-1975 Level of Service
672.6 million:	1975-1976 Module 2 Amount
$118.3 million:	Cut

The 1974-1975 Module 2 amount is the base budget requirement for the 1975-1976 school year. To this must be added $38.0 million for mandatory and essential increases -- increases in the cost of doing business over which the thirty-two community school districts exercise no control. In order to maintain the 1974-1975 level of service, $790.9 million is needed in 1975-1976. The 1975-1976 budget contains $672.6 million in Module 2 (Instructional Services), a cut of $118.3 million, or 15.7%, in regular classroom services. Applying the same logic to the total of Modules 1, 2, 3, 4 and 5, educational services were cut more than 17%. These cuts have been made by laying off staff, eliminating programs, doing without instructional materials, and increasing workloads.

Table I-2

UNIT OF APPROPRIATION 30 BY MODULE

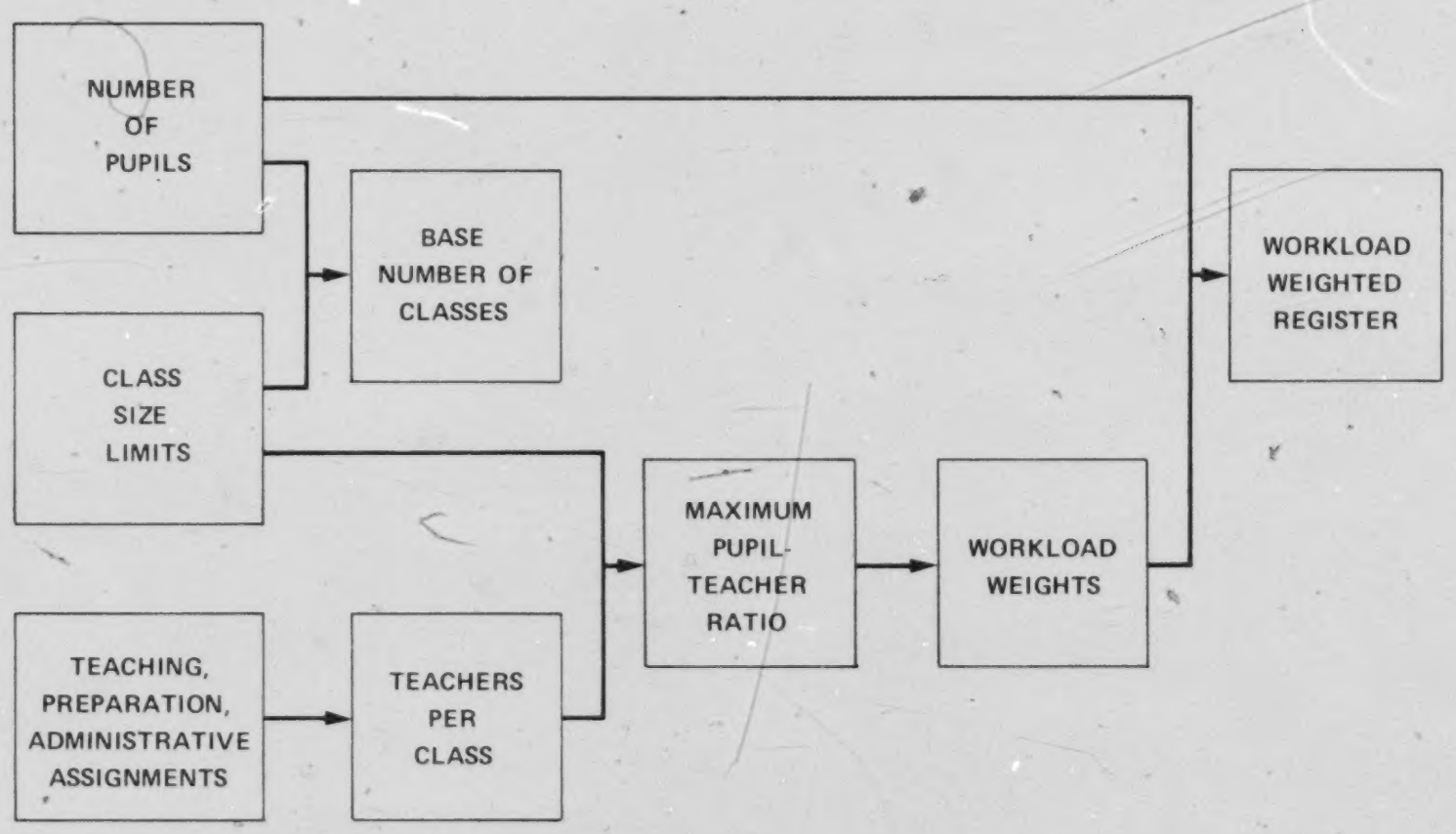
FISCAL YEAR 1975-1976

Module	Function	ALLOCATION Tax Levy	State Aid Special Needs	Total	Percent of Total
1	Community School Boards and District Administration	$ 15,705,305	$ --	$ 15,705,305	1.38%
2	Instructional Services	635,324,418	37,284,637	672,609,055	58.94
2A	Basic Instruction*	(612,074,240)	(--)	(612,074,240)	(53.64)
2B	Special Needs*	(23,250,178)	(37,284,637)	(60,534,815)	(5.30)
3A	Continuing Education	7,434,889	--	7,434,889	0.65
3B	Extended Use of School Buildings	3,057,744	--	3,057,744	0.27
4A	New York State Textbook Law**	7,628,000	--	7,628,000	0.67
4B	Funds for Capital Note Items	6,870,878	--	6,870,878	0.60
5A	Special Purpose Funds	108,280,031	--	108,280,031	9.49
5B	Special Purpose Reserve	36,164,517	--	36,164,517	3.17
6	Fringe Benefits***	274,271,578	8,009,523	282,281,101	24.73
7	Furniture and Equipment	1,135,000	--	1,135,000	0.10
	TOTAL****	$1,095,872,360	$ 45,294,160	$ 1,141,166,520	100.00%

*Module 2A and 2B amounts in parentheses sum to the Module 2 amounts.
**Subject to change depending upon K-9 registration as of September 30, 1975.
***These funds are not allocated by formula but are retained by Central Board and placed in trust for intended purposes.
****Includes $702,853 of carry over funds from the 1974-1975 modified budget.

Figure II-1

DEVELOPING THE WORKLOAD WEIGHTED REGISTER



-6-

Table I-4

COMPARISION OF UNIT OF APPROPRIATION 30 BY MODULE

FISCAL YEARS 1974-1975 AND 1975-1976

MODULE	FUNCTION	UNIT OF APPROPRIATION 1974-1975	UNIT OF APPROPRIATION 1975-1976	CHANGE AMOUNT	CHANGE PERCENT
1	Community School Boards and District Administration	$ 18,109,259	$ 15,705,305	(-)$ 2,403,954	(-)13.3%
2	Instructional Services	752,929,984	672,609,055	(-) 80,320,929	(-)10.67
2A	Basic Instruction*	[685,814,285]	[612,074,240]	[(-) 73,740,045]	[(-)10.75]
2B	Special Needs*	[67,115,699]	[60,534,815]	[(-) 6,580,884]	[(-) 9.81]
3A	Continuing Education	16,393,954	7,434,889	(-) 8,959,065	(-)54.6
3B	Extended Use of School Buildings	6,731,856	3,057,744	(-) 3,674,112	(-)54.6
4A	New York State Textbook Law	7,636,500	7,628,000	(-) 8,500	(-) 0.1
4B	Funds for Capital Note Items	7,140,934	6,870,878	(-) 270,056	(-) 3.8
5A	Special Purpose Funds	104,965,166	108,280,031	3,314,865	3.2
5B	Special Purpose Reserve	37,429,924	36,164,517	(-) 1,265,407	(-) 3.4
6	Fringe Benefits	259,931,593	282,281,101	22,349,508	8.6
7	Furniture and Equipment	1,135,000	1,135,000	--	--
TOTAL		$1,212,404,170	$1,141,166,520	(-)$71,237,650	(-) 5.88%

*Module 2A and 2B amounts in brackets sum to the Module 2 amounts.

II. IMPACT OF WORKLOAD FACTORS ON TEACHER RESOURCE ALLOCATION

In developing allocation formulae, it is essential to establish workload factors for classroom teachers in kindergarten, elementary schools, and junior high schools. These workload factors impose conditions on resource allocation decision making. The objective formulae we develop to distribute monies placed in Module 2A for basic instructional services identify the resources required to meet the following classroom workload factors:

- Class size limits.
- Teaching, preparation, and administrative period assignments.

Workload factors differ for kindergarten, elementary schools and junior high schools. They also differ for Title I and Non-Title I schools* at each level. Title I schools receive more teacher resources per pupil than Non-Title I schools.

We will show how the workload factors determine the number of classes a district must have, the number of teachers needed for each class, and what the pupil-teacher ratio must be. Pupil-teacher ratios are measures of teacher resources required by the district's students. They are the building blocks for developing a district's workload weighted register, a register that weights pupils by their teacher resource requirements. Figure II-1 illustrates the procedure we will follow.

*A school receives a "Title I" designation when 39.6% or more of its enrollment is made up of students from low income families.

Table 1-3

DISTRICT ALLOCATION BY FORMULAE - FISCAL YEAR 1975-1976

DISTRICT	MODULE 1 ALLOCATION	MODULE 2 ALLOCATION	MODULE 3 ALLOCATION	MODULE 4B ALLOCATION	MODULE 7 ALLOCATION	TOTAL FORMULAE ALLOCATION
1	$ 433,097	$ 13,391,630	$ 209,812	$ 135,304	$ 26,517	$ 14,196,360
2	471,924	18,796,838	348,395	190,801	40,828	19,848,786
3	451,363	15,788,864	262,147	159,280	26,624	16,688,278
4	438,819	14,255,501	230,370	141,066	20,392	15,086,148
5	455,179	16,159,239	248,111	168,240	22,770	17,053,539
6	455,506	16,021,982	252,993	164,187	24,759	16,919,427
7	493,352	21,952,318	340,171	225,194	48,703	23,059,738
8	522,213	26,348,530	399,199	270,851	43,135	27,583,928
9	562,171	31,069,846	467,901	323,651	51,417	32,474,986
10	533,461	27,586,536	422,210	280,591	46,831	28,869,629
11	500,300	22,092,274	354,409	226,057	40,272	23,213,312
12	507,581	23,155,496	364,770	239,381	35,039	24,302,267
13	473,728	18,640,568	298,762	192,292	31,747	19,637,097
14	496,502	23,110,288	368,043	230,922	45,629	24,251,384
15	496,087	22,485,273	388,754	227,171	38,430	23,635,715
16	447,565	14,408,579	258,964	151,375	24,869	15,291,352
17	503,639	22,843,218	329,887	238,317	35,966	23,951,027
18	467,315	17,609,724	245,186	184,286	29,327	18,535,838
19	516,774	25,772,484	376,010	259,177	41,550	26,965,995
20	503,048	21,954,069	386,265	227,514	37,358	23,108,254
21	499,753	21,463,965	329,620	222,230	32,363	22,547,931
22	503,337	21,526,334	337,244	221,677	35,193	22,623,785
23	452,671	15,598,923	246,358	163,149	28,540	16,489,641
24	501,061	21,229,174	345,175	221,836	33,707	22,330,953
25	497,594	20,799,533	323,757	214,417	33,123	21,868,414
26	450,948	14,713,022	214,007	150,679	22,385	15,551,041
27	523,024	25,023,855	395,708	251,925	40,570	26,235,082
28	491,856	20,853,769	313,338	212,784	32,850	21,904,597
29	502,821	22,500,835	338,852	229,507	34,765	23,606,780
30	490,365	20,369,353	332,575	208,563	32,970	21,433,826
31	590,966	33,329,508	503,842	348,825	55,274	34,828,415
32	471,295	18,626,310	259,798	189,629	41,097	19,588,129
SUB-TL	$15,705,305	$669,477,838	$10,492,633	$6,870,878	$1,135,000	$703,681,654
HOLD-HARMLESS ADJUSTMENT		3,131,217				3,131,217

I. CLASS SIZE LIMITS

The class size limits in the 1975-1977 contract are the same as in the 1972-1975 contract. The size of regular classes must be at or below the following limits* (Figure II-2):

- Kindergarten: 50 pupils per class. Kindergarten is a half day program. A "class" is made up of 25 children in the morning and 25 in the afternoon.
- Elementary school: 32 pupils per class.
- Junior high school
  - Title I School: 30 pupils per class
  - Non-Title I School: 33 pupils per class.

The base number of classes of full-time equivalent students is given by the following relationship:

$$\text{DISTRICT d BASE NUMBER OF CLASSES} = \frac{\text{DISTRICT d NUMBER OF PUPILS IN REGISTER}}{\text{MAXIMUM CLASS SIZE}}$$

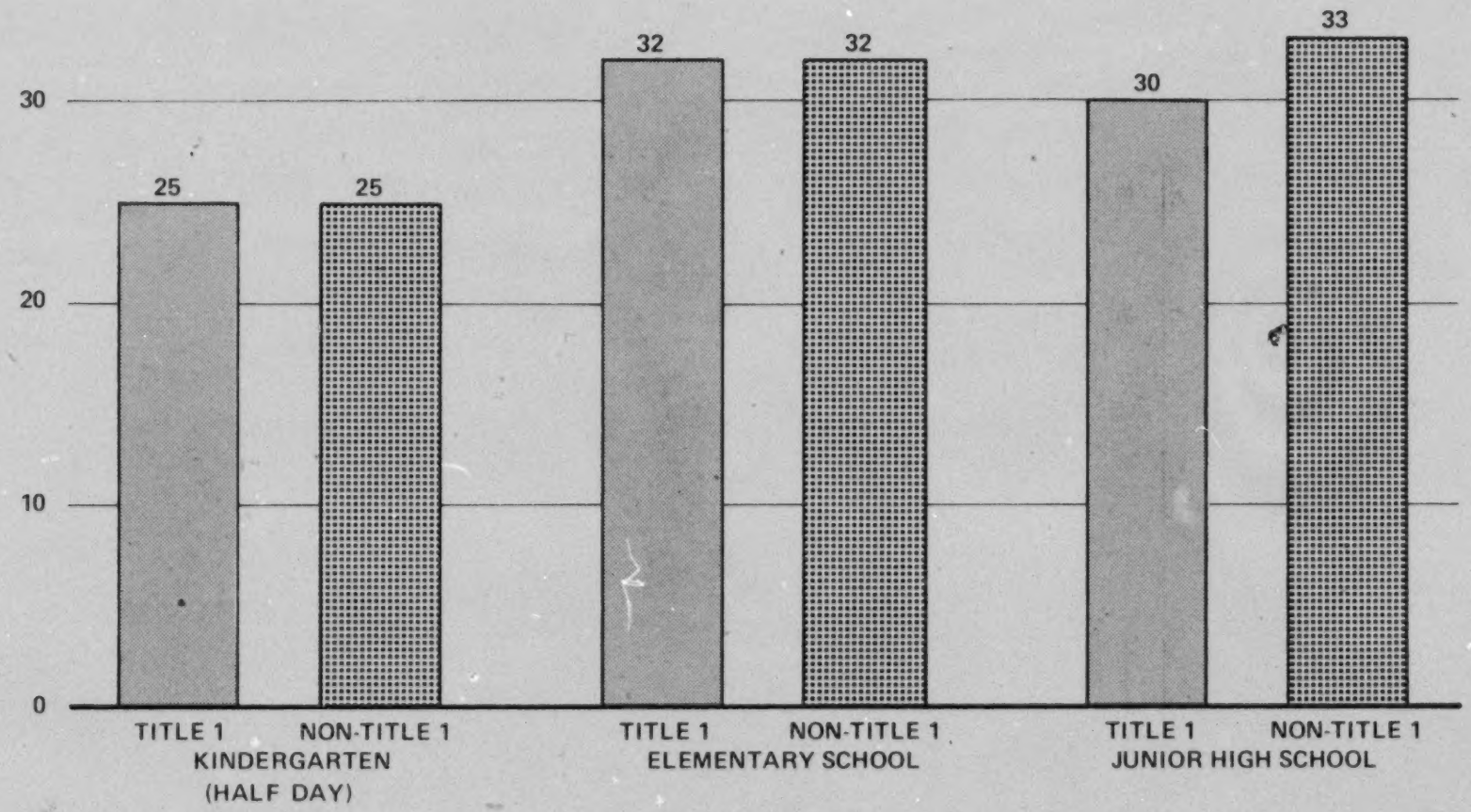
*An acceptable reason for exceeding the maximum class size limitations listed above may be any of the following:

- There is no space available to permit scheduling any additional class or classes in order to reduce class size.
- Conforming to the class size objective would result in placing additional classes on short time schedule.
- Conforming to the class size objective would result in organizing half-classes.
- A class larger than the maximum is necessary or desirable in order to provide for specialized or experimental instruction, for IGC instruction, or for placing pupils in a subject class of which there is only one on a grade.

In the event that it is necessary to assign a teacher to a class that exceeds the maximum size listed above, the principal shall stipulate the reason in writing to the teacher and to the Chancellor.

Figure II-2

MAXIMUM CLASS SIZE LIMITS



- For example, District II has a base of 750 classes. The calculations are shown below.

DISTRICT II BASE NUMBER OF CLASSES

LEVEL	TITLE I STATUS	ADJUSTED REGISTER*	MAXIMUM CLASS SIZE	BASE NUMBER OF CLASSES
Kindergarten	Title I	456	50	9
Kindergarten	Non-Title I	1,694	50	34
Elementary	Title I	3,647	32	114
Elementary	Non-Title I	10,296	32	322
Junior High	Title I	1,233	30	41
Junior High	Non-Title I	7,603	33	230
TOTAL		24,929	--	750

2. TEACHERS PER CLASS

Since at least one teacher must be assigned to each class, the number of teachers required cannot be less than the base number of classes. We will show that more than one teacher is required per class.

*See Appendix A.

The teacher's workday is separated into teaching, preparation, and administrative periods.* The number of periods allowed varies by level and by Title I or Non-Title I status. When a teacher is taking a preparation or administrative period, another teacher must be assigned to

*Teaching, preparation and administrative periods for junior high school teachers are defined as follows:

- "Teaching periods" are those periods in which the teacher is involved with the pupil in the act of teaching, either as an individual or as a member of a teaching team, and has participated in planning the instruction to be conducted.

- "Preparation periods" are those periods during which the teacher is not assigned to a regularly programmed responsibility. Teachers are expected to utilize their professional preparation time in such manner as to enable them to further their professional work for the purpose of greater effectiveness in the classroom.

- "Administrative periods" are those periods during which the teacher is programmed for regular activity other than teaching.

For kindergarten and elementary school teachers, the definition of preparation periods is significantly different:

- Preparation periods shall be used for unassigned professional work. Teachers are expected to utilize their professional preparation time in such manner as to enable them to further their professional work for the purpose of greater effectiveness in the classroom. Preparation periods shall be used for professional, job-related work that may include but is not limited to preparing for classes, preparing teaching material, presenting or attending demonstration lessons, participating in teacher training, and holding conferences with the principal, other teachers, guidance counselors or parents.

cover the class. Each class actually requires more than one teacher, and the number of teachers determined from class size limits must be adjusted upward to insure adequate class coverage. The calculations for kindergarten and elementary schools and for junior high schools are developed step by step in the following sections.

For the 1975-1976 school year, the instructional week (27.5 hours) for pupils in elementary and junior high schools will be shortened by two periods (1.5 hours), a 5% reduction.

- Two days a week, pupils will be dismissed one period (45 minutes) early.

During these two periods, teachers will be assigned preparation periods, and no classroom coverage is necessary.

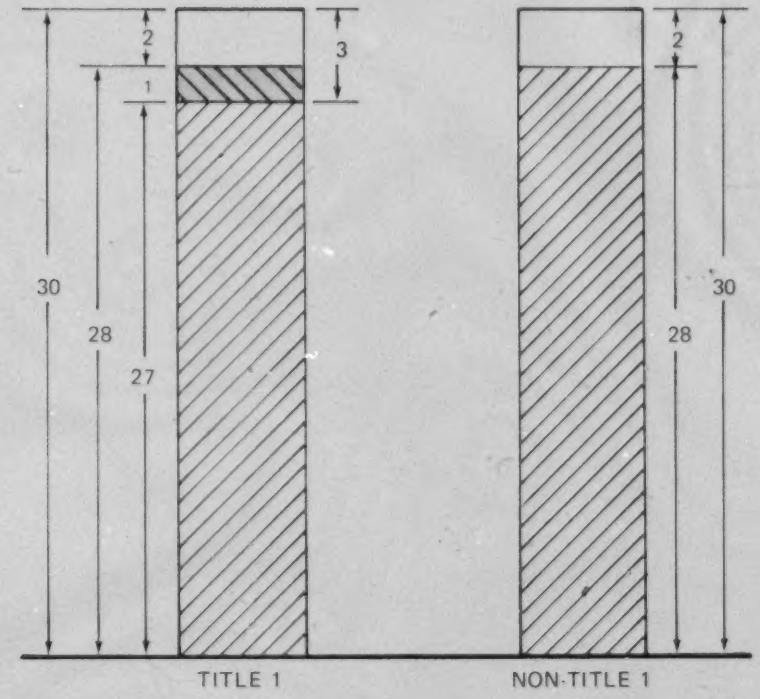
A. Kindergarten and Elementary Schools

Instruction time in kindergarten and elementary schools can be divided into the equivalent of 30 periods per week. All teachers in kindergarten and elementary schools have their week of 30 periods divided into teaching and preparation periods. Under the 1975-1977 contract (Figure II-3):

- Title I schools allow teachers to have the equivalent of 27 teaching and 3 perparation periods per week.
- Non-Title I schools allow teachers to have the equivalent of 28 teaching and 2 preparation periods per week.

Figure II-3

TEACHING AND PREPARATION PERIODS PER WEEK
KINDERGARTEN AND ELEMENTARY SCHOOL
1975-1977 CONTRACT



PREPARATION: NOT COVERED PREPARATION: COVERED TEACHING

Since pupils are in class 28 periods a week, these circumstances call for additional teachers, who are usually "cluster teachers," to cover classes when the "regular" teacher is engaged in preparation.* The proportion of the required additional cluster teacher is computed from the following expression:

$$\text{ADDITIONAL TEACHER PER CLASS} = \frac{\text{NUMBER OF INSTRUCTIONAL PERIODS REQUIRING COVERAGE}}{\text{NUMBER OF TEACHING PERIODS PER WEEK ASSIGNED TO A CLUSTER TEACHER}}$$

- For Title I schools, the additional proportion of a teacher per class is equal to 1/27 = 0.04.
- For Non-Title I schools, the additional proportion of a teacher per class is equal to 0/28 = 0.

The total number of teachers required per class is equal to one regular teacher plus an additional proportion of a cluster teacher (Figure II-4).

- For Title I schools, the total number of teachers required per class is equal to 1 + 0.04 = 1.04.
- For Non-Title I schools, the total number of teachers required per class is equal to 1 + 0 = 1.00.

The elementary school workload factors in the 1975-1977 contract differ from those in the 1972-1975 contract (Figure II-5).

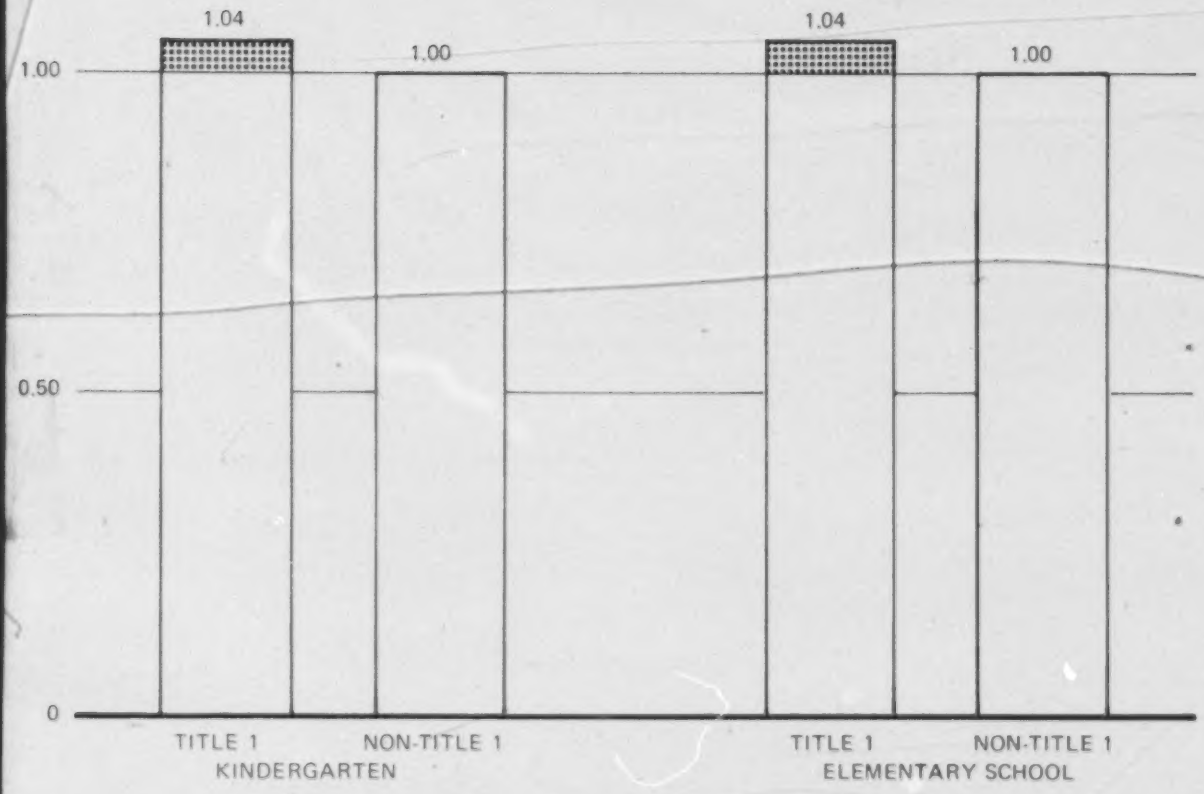
---

*The term "cluster teacher" refers to teaching personnel in elementary schools who are specially assigned to teaching classes in music, art, science, health education or the fundamental skills and who are not assigned to a homeroom class.

The cluster teacher's program can include more than twenty teaching periods per week. See "Appeal to the Superintendent of Schools of Ann Auguilar, Teacher at P97X," January 5, 1968.

Figure II-4

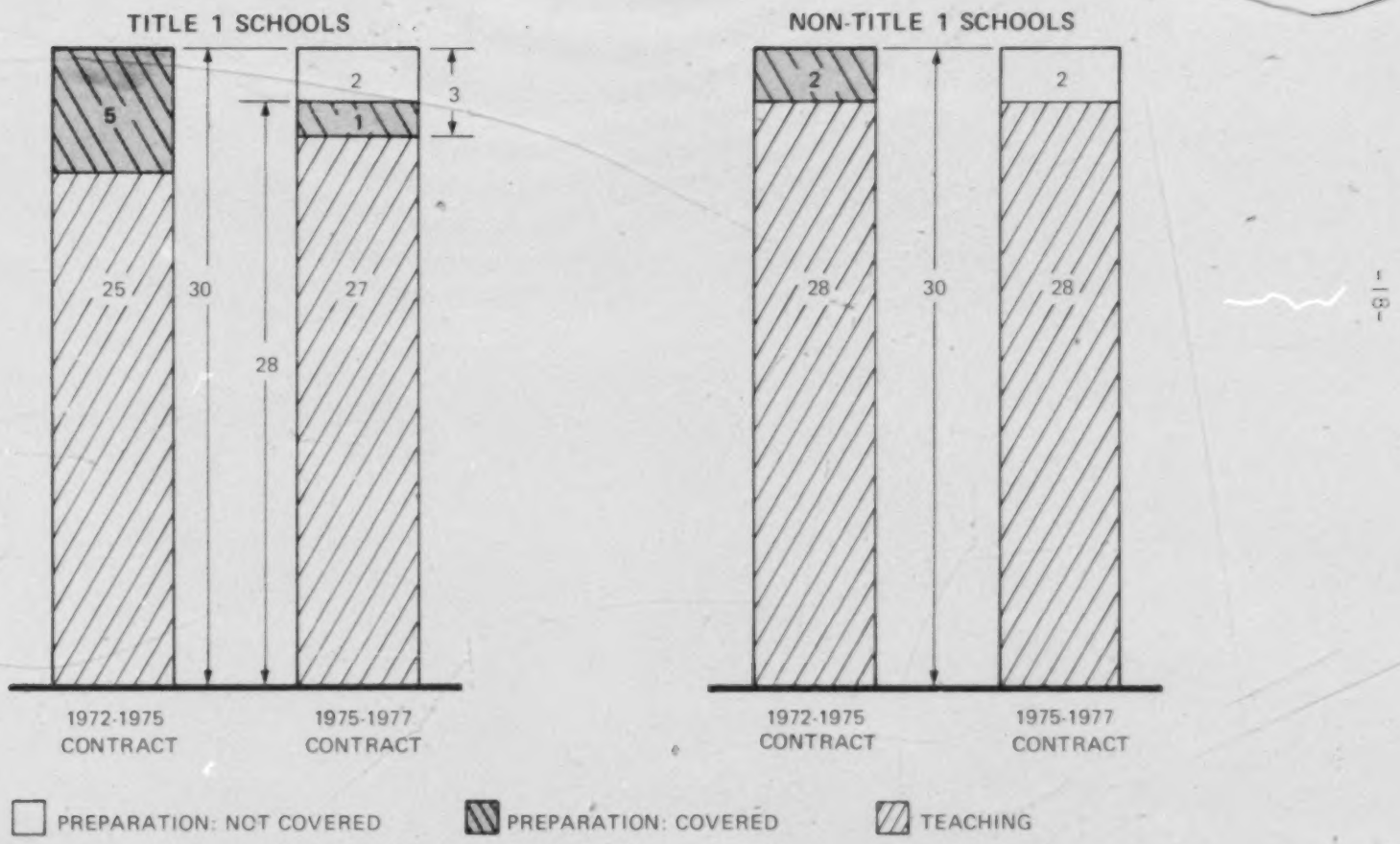
TOTAL NUMBER OF TEACHERS PER CLASS
KINDERGARTEN AND ELEMENTARY SCHOOLS
1975-1977 CONTRACT



-17-

Figure II-5

TEACHING AND PREPARATION PERIODS PER WEEK
KINDERGARTEN AND ELEMENTARY SCHOOLS
1972-1975 AND 1975-1977 CONTRACTS



	TITLE I SCHOOLS			NON-TITLE I SCHOOLS		
	1972-1975 CONTRACT	1975-1977 CONTRACT	PERCENT CHANGE	1972-1975 CONTRACT	1975-1977 CONTRACT	PERCENT CHANGE
STUDENTS' WEEK						
Instructional Periods	30	28	- 5%*	30	28	- 5%*
Dismissed	--	2	--	--	2	--
TOTAL PERIODS	30	30	0%	30	30	0%
TEACHERS' WEEK						
Teaching Periods	25	27	8%	28	28	0%
Preparation Periods	5	3	-40%	2	2	0%
Coverage Required	5	1	-80%	2	0	-100%
No Coverage Required	--	2	--	--	2	--
TOTAL PERIODS	30	30	0%	30	30	0%

- Students' instructional time is reduced 5%.*
- Title I teachers' classroom time is increased 8%.
- Title I teachers' preparation periods are reduced 40%.
- Title I Preparation period coverage is reduced 80%, and the Non-Title I coverage is reduced 100%.

B. Junior High Schools

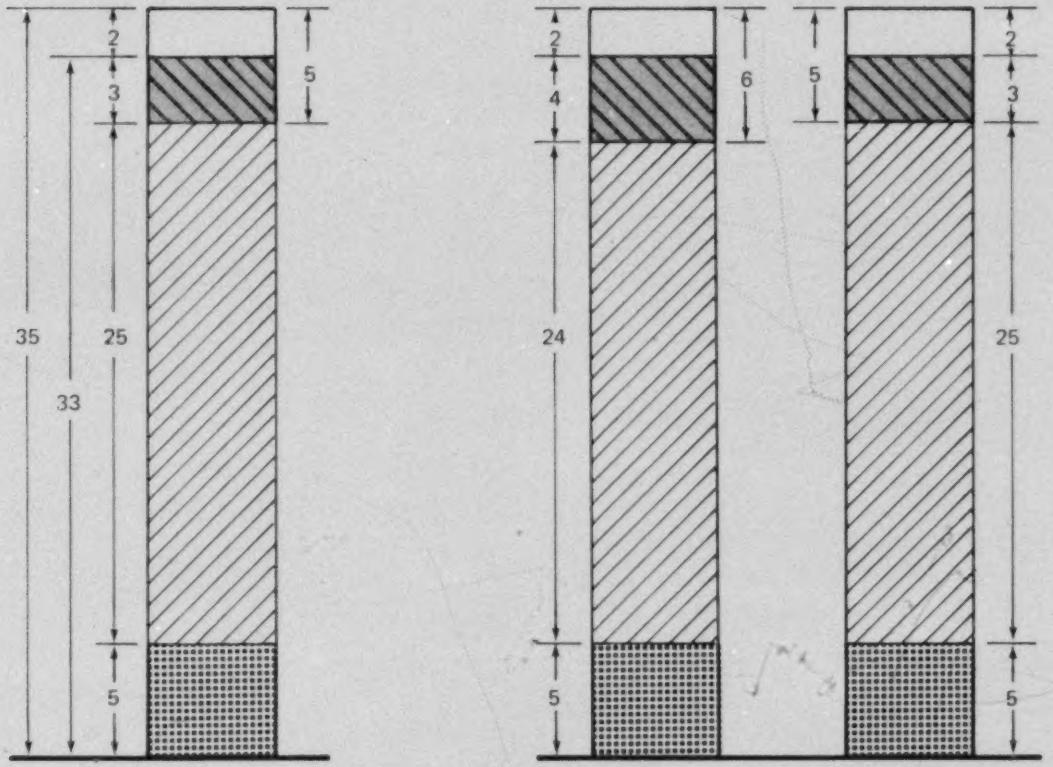
Students in junior high schools will attend classes 7 periods per day for three days a week and 6 periods per day for two days a week, or 33 periods per week. All teachers in junior high schools have their week of 35 periods divided into teaching periods, preparation periods, and administrative periods (Figure II-6).

- Title I schools allow homeroom teachers to have 24 teaching, 6 preparation, and 5 administrative periods per week.

*The 5% is based on the reduction in time, 1.5 hours a week, and not the number of periods.

Figure II-6

TEACHING, PREPARATION AND ADMINISTRATIVE
PERIODS PER WEEK
JUNIOR HIGH SCHOOL
1975-1977 CONTRACT



- Non-Title I schools allow homeroom teachers to have 25 teaching, 5 preparation, and 5 administrative periods per week.

- All junior high schools allow non-homeroom teachers to have 25 teaching, 5 preparation, and 5 administrative periods per week.*

The proportion of an additional teacher needed to cover a class while the regular teacher is engaged in preparation or administrative activities is computed from the following expression:

$$\text{ADDITIONAL TEACHER PER CLASS} = \frac{\text{NUMBER OF INSTRUCTIONAL PERIODS REQUIRING COVERAGE WHEN ON PREPARATION} + \text{NUMBER OF INSTRUCTIONAL PERIODS REQUIRING COVERAGE WHEN ON ADMINISTRATIVE ASSIGNMENT}}{\text{NUMBER OF TEACHING PERIODS PER WEEK ASSIGNED TO NON-HOMEROOM TEACHERS}}$$

- For Title I schools, the proportion of an additional teacher per class is equal to (4+5)/25 = 9/25 = 0.36.

- For Non-Title I schools, the proportion of an additional teacher per class is equal to (3+5)/25 = 8/25 = 0.32.

The total number of teachers required per class is equal to one regular teacher plus a proportion of an additional preparation teacher (Figure II-7).

- For Title I schools, the total number of teachers required per class is equal to 1 + 0.36 = 1.36.

- For Non-Title I schools, the total number of teachers required per class is equal to 1 + 0.32 = 1.32.

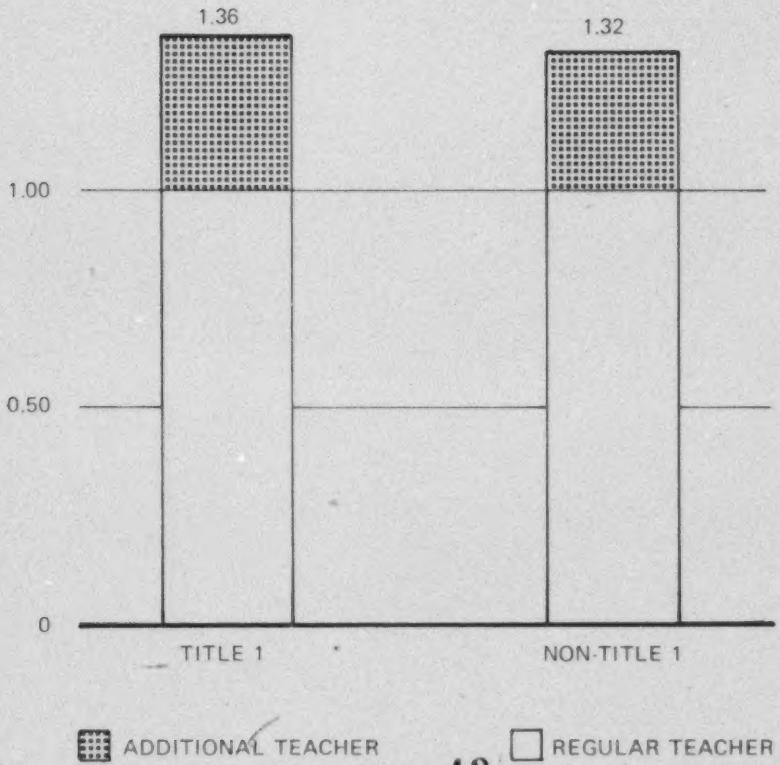
---

*"Appeal to the Superintendent of Schools of Audrey Sutton et al, Teachers at J125X," March 13, 1970.

- There is no established city-wide policy in regard to the programs of non-homeroom teachers in special service junior high schools.

Figure II-7

TOTAL NUMBER OF TEACHERS PER CLASS
JUNIOR HIGH SCHOOLS
1975-1977 CONTRACT



The junior high school workload factors in the 1975-1977 contract differ from those in the 1972-1975 contract (Figure II-8).

	TITLE I SCHOOLS			NON-TITLE I SCHOOLS		
	1972-1975 CONTRACT	1975-1977 CONTRACT	PERCENT CHANGE	1972-1975 CONTRACT	1975-1977 CONTRACT	PERCENT CHANGE
STUDENTS' WEEK						
Instructional Periods	35	33	- 5%*	35	33	- 5%*
Dismissed	--	2	--	--	2	--
TOTAL PERIODS	35	35	0%	35	35	0%
TEACHERS' WEEK						
Teaching Periods	22	24	9%	25	25	0%
Preparation Periods	8	6	-25%	5	5	0%
Coverage Required	8	4	-50%	5	3	-40%
No Coverage	--	2	--	--	2	--
Administrative Periods	5	5	0%	5	5	0%
TOTAL PERIODS	35	35	0%	35	35	0%

- Student's instructional time is reduced 5%.*
- Title I teachers' classroom time is increased 9%.
- Title I teachers' preparation periods are reduced 25%.
- Title I preparation period coverage is reduced 50%, and the Non-Title I coverage is reduced 40%.

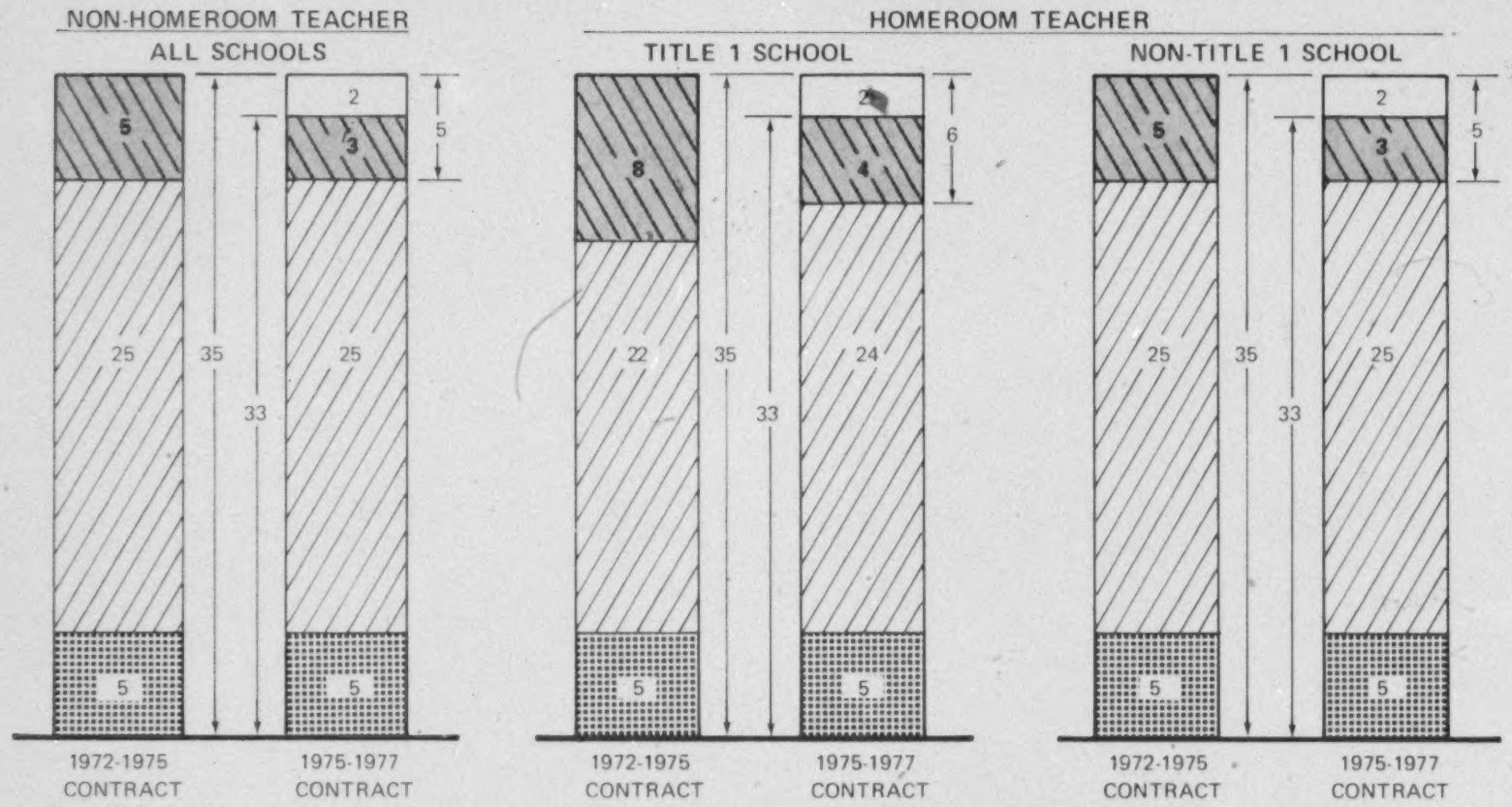
3. PUPIL-TEACHER RATIOS

These class size limits and the teaching, preparation, and administrative periods can be translated into school or district wide maximum pupil-teacher ratios. These ratios provide a common basis for comparing interdistrict resource requirements.

*The 5% is based on the reduction in time, 1.5 hours a week, and not the number of periods.

Figure II-8

TEACHING, PREPARATION AND ADMINISTRATIVE PERIODS PER WEEK
JUNIOR HIGH SCHOOLS
1972-1975 AND 1975-1977 CONTRACTS



The allowances for teaching, preparation, and administrative periods increase the required number of teachers so that the maximum school or district wide pupil-teacher ratios are lowered below the class size limits. To put it another way, the maximum school or district wide pupil-teacher ratios are less than the class size limits because more than one teacher per class is required. The extent of the reduction is determined by the required number of teachers per class:

$$\text{MAXIMUM PUPIL-TEACHER RATIO} = \frac{\text{CLASS SIZE LIMIT}}{\text{TEACHERS PER CLASS}}$$

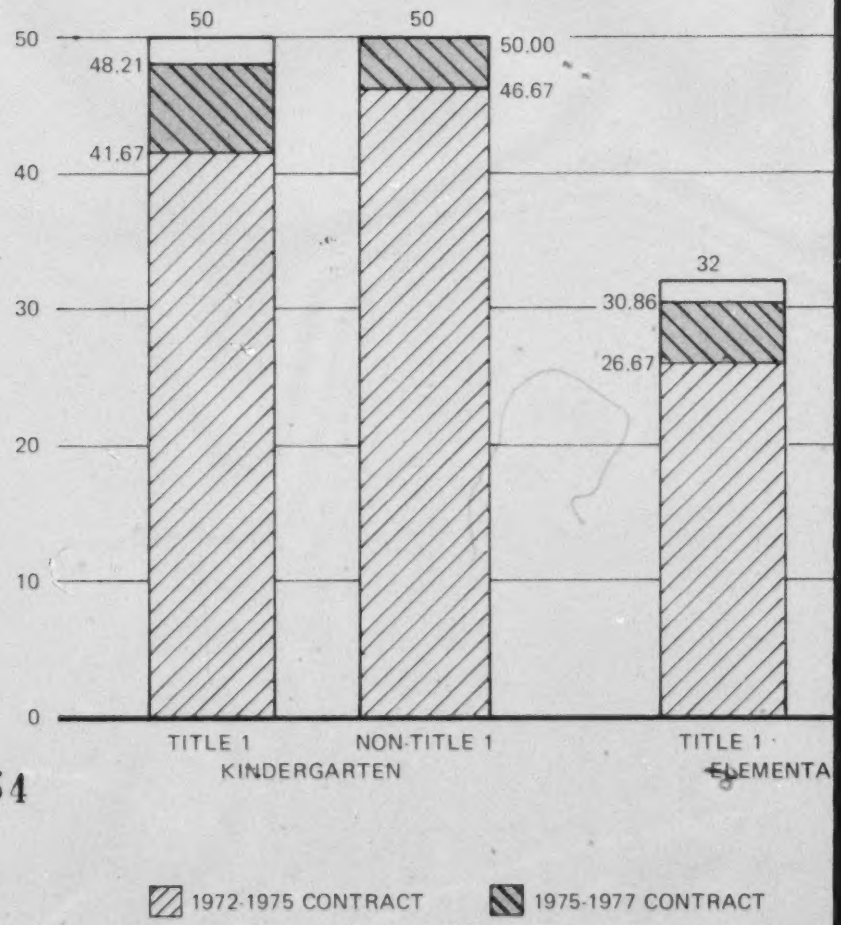
By performing the calculations for each type of school, we obtain the following pupil-teacher ratios (Figure II-9):

		TEACHERS PER CLASS			MAXIMUM PUPIL-TEACHER RATIO		
LEVEL	CLASS SIZE	1972-1975 CONTRACT	1975-1977 CONTRACT	PERCENT CHANGE	1972-1975 CONTRACT	1975-1977 CONTRACT	PERCENT CHANGE
Kindergarten							
Title I	50	1.20	1.04*	-14%	41.67*	48.21*	16%
Non-Title I	50	1.07*	1.00	- 7%	46.67*	50.00	7%
Elementary							
Title I	32	1.20	1.04*	-14%	26.67*	30.86*	16%
Non-Title I	32	1.07*	1.00	- 7%	29.87*	32.00	7%
Junior High School							
Title I	30	1.52	1.36	-11%	19.74*	22.06*	12%
Non-Title I	33	1.40	1.32	- 6%	23.57*	25.00	6%

*Approximate value rounded to two decimal places.

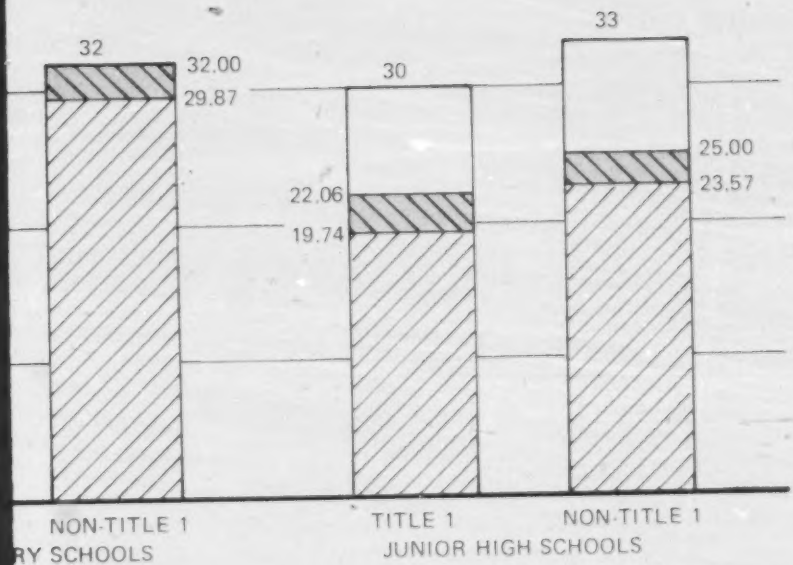
Figur

MAXIMUM PUPIL-
1972-1975 AND 197



e 11-9

TEACHER RATIO
5-1977 CONTRACTS



A district that has both Title I and Non-Title I schools at some level would have a maximum pupil-teacher ratio for that level that is a weighted average of the pupil-teacher ratios for Title I and Non-Title I schools.

- For example, a district that has 25% of its 10,000 elementary students in Title I schools would have a maximum pupil-teacher ratio of 31.71 computed as follows:

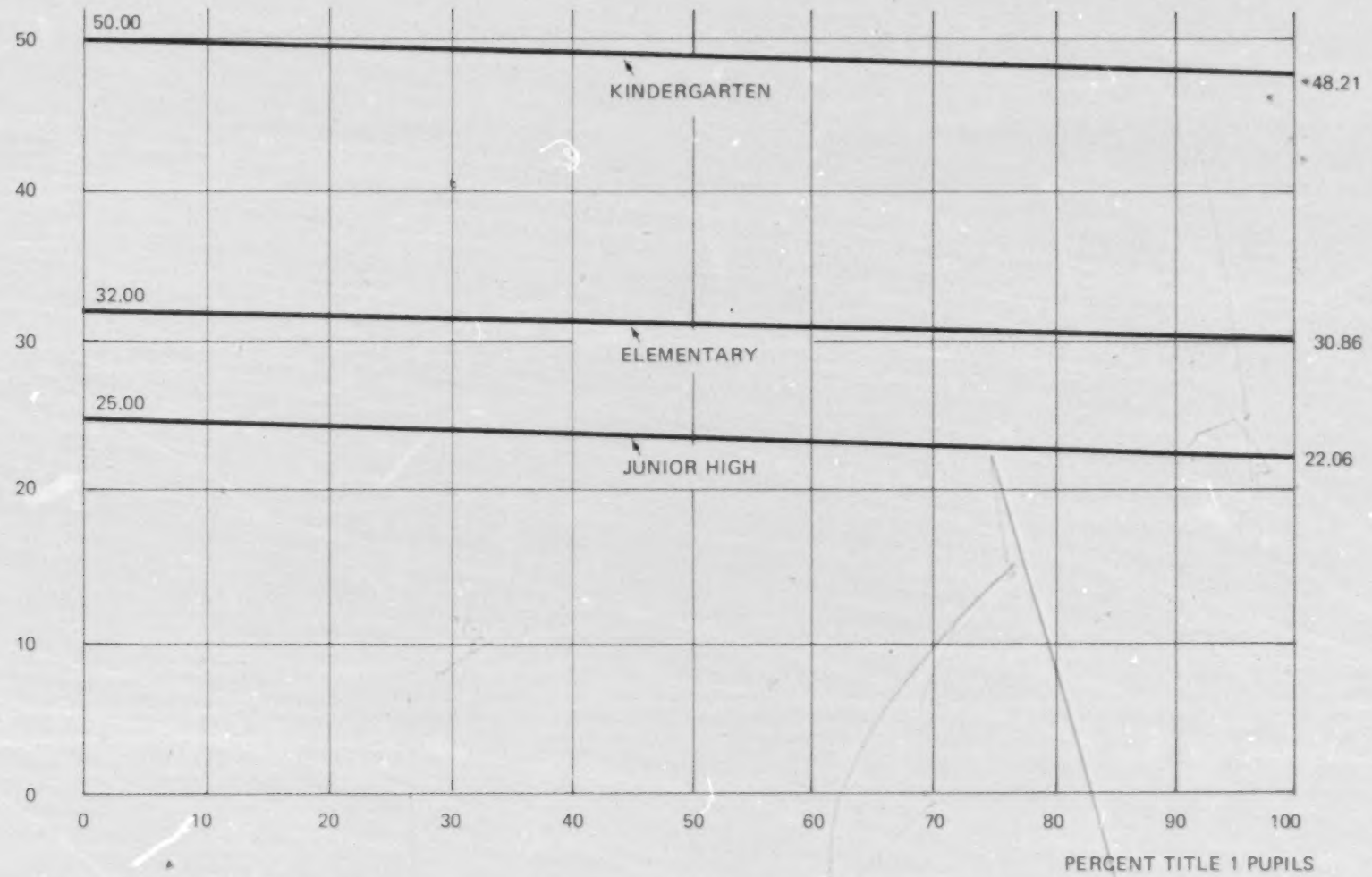
$$\begin{array}{rcl} \text{WEIGHTED AVERAGE MAXIMUM PUPIL-TEACHER RATIO} & = & \dfrac{10{,}000 \text{ PUPILS}}{\dfrac{0.25 \times 10{,}000 \text{ PUPILS}}{30.86 \text{ TITLE I PUPILS PER TEACHER}} + \dfrac{(1 - 0.25) \times 10{,}000 \text{ PUPILS}}{32.00 \text{ NON-TITLE I PUPILS PER TEACHER}}} \\ & = & \dfrac{10{,}000 \text{ PUPILS}}{81 \text{ TEACHERS} + 234 \text{ TEACHERS}} \\ & = & 31.71 \text{ PUPILS PER TEACHER} \end{array}$$

Figure II-10 illustrates how maximum pupil-teacher ratios depend on the percent of students in Title I schools. This graph combines everything we have developed in our analysis into one simple statement. At a glance, we can determine the basic classroom teacher requirements for any district. The only additional information we need is the percent of students in Title I schools of the particular level.

- For example, a district that has 40% of its junior high school students in Title I schools is obligated to have a junior high school pupil-teacher ratio no higher than 23.7.

Figure II-10

MAXIMUM PUPIL-TEACHER RATIOS AND PERCENT OF TITLE 1 PUPILS 1975-1977 CONTRACT



4. THE WORKLOAD WEIGHTED REGISTER

Pupil-teacher ratios are indexes of teacher resource requirements: one teacher for a given number of students. We can use the maximum pupil-teacher ratios derived from classroom workload factors to develop workload weights that reflect the relative teacher resource requirements among the levels and between Title I and Non-Title I status. These weights are applied to the adjusted register of each district to generate a district's workload weighted register. The workload weighted register is used for allocating Module 2A and Module 4B funds.

The weights are simply ratios of the elementary Non-Title I pupil-teacher ratio (used as a "standard") to each maximum pupil teacher ratio.

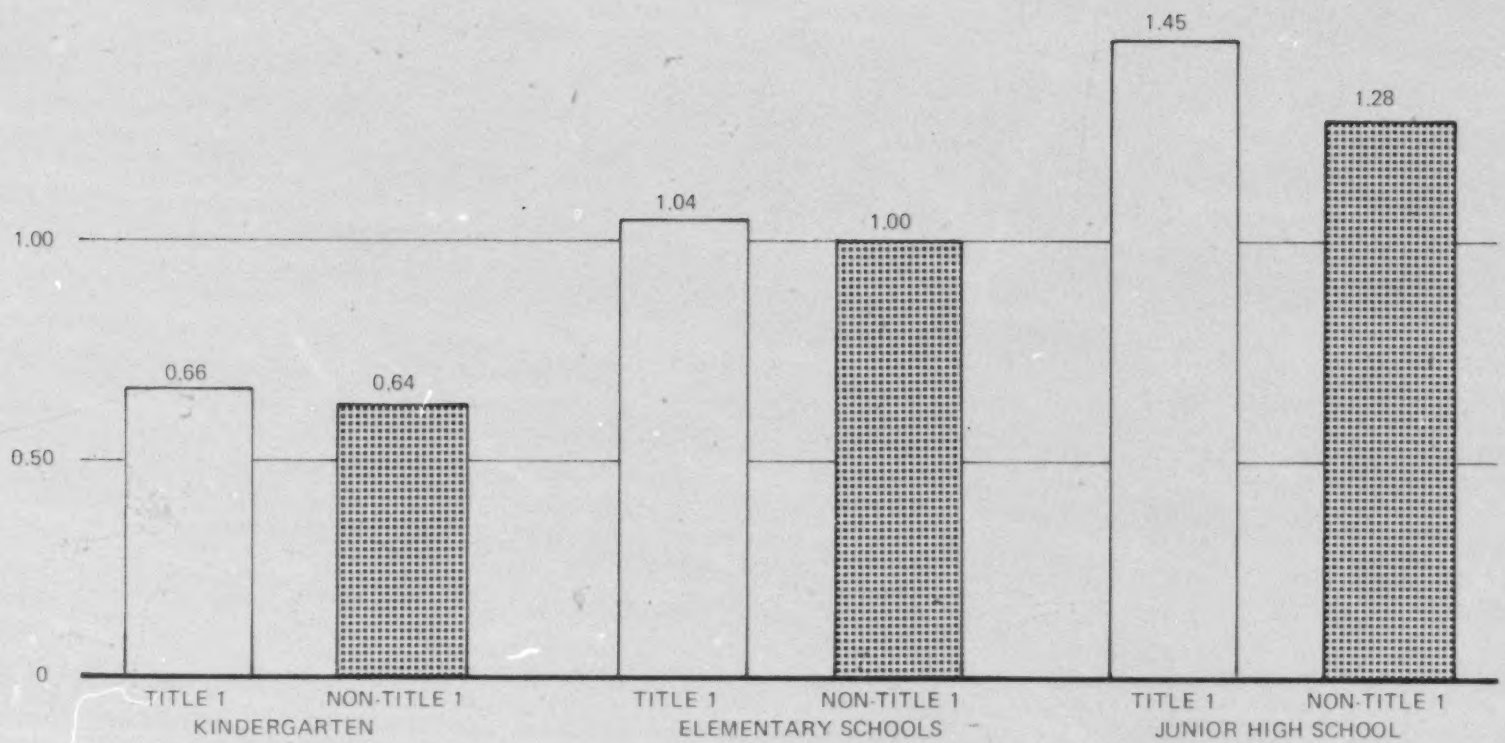
$$\text{WORKLOAD WEIGHT} = \frac{\text{"STANDARD" PUPIL-TEACHER RATIO}}{\text{MAXIMUM PUPIL-TEACHER RATIO}}$$

By performing the calculations for each type of school, we obtain the following workload weights (Figure II-II):

	"STANDARD" PUPIL-TEACHER RATIO		PUPIL-TEACHER RATIO		WORKLOAD WEIGHT	
LEVEL	1972-1975 CONTRACT	1975-1977 CONTRACT	1972-1975 CONTRACT	1975-1977 CONTRACT	1972-1975 CONTRACT	1975-1977 CONTRACT
Kindergarten						
Title I	29.87	32.00	41.67	48.21	0.72	0.66
Non-Title I	29.87	32.00	46.67	50.00	0.64	0.64
Elementary						
Title I	29.87	32.00	26.67	30.86	1.12	1.04
Non-Title I	29.87	32.00	29.87	32.00	1.00	1.00
Junior High School						
Title I	29.87	32.00	19.74	22.06	1.51	1.48
Non-Title I	29.87	32.00	23.57	25.00	1.27	1.28

Figure II-11

WORKLOAD WEIGHTS
1975-1977 CONTRACT



The weights can be interpreted as the required number of teachers per 32.00 students to meet the workload factors for class size and teachers per class, where the 32.00 is the "standard" pupil-teacher ratio.

- For example, 100 teachers are required for every 3,200 students in Non-Title I elementary schools
  - Only 64 teachers are required for every 3,200 students in Non-Title I kindergarten
  - But 128 teachers are required for every 3,200 students in Non-Title I junior high schools.

The table below shows how the workload weighted register is developed.

WORKLOAD WEIGHTED REGISTER = ADJUSTED REGISTER X WORKLOAD WEIGHT

A district's total workload weighted register is the combined sum of the six workload weighted registers for each level and Title I status.

COMPUTING THE WORKLOAD WEIGHTED REGISTER FOR DISTRICT 11

LEVEL	TITLE I STATUS	ADJUSTED REGISTER	WORKLOAD WEIGHT	WORKLOAD WEIGHTED REGISTER
Kindergarten	Title I	456	0.66	301
Kindergarten	Non-Title I	1,694	0.64	1,084
Elementary	Title I	3,647	1.04	3,793
Elementary	Non-Title I	10,296	1.00	10,296
Junior High	Title I	1,233	1.45	1,788
Junior High	Non-Title I	7,603	1.28	9,732
TOTAL		24,929	--	26,994

The city-wide total workload weighted register is the sum of all the districts' workload weighted registers (Table II-1).

Table 11-1

WORKLOAD WEIGHTED REGISTER, FISCAL YEAR 1975-1976

DISTRICT	KINDERGARTEN			ELEMENTARY			JUNIOR HIGH			TOTAL
	TITLE I	NON-TITLE I	TOTAL	TITLE I	NON-TITLE I	TOTAL	TITLE I	NON-TITLE I	TOTAL	
1	710	0	710	9,245	0	9,245	6,202	0	6,202	16,157
2	671	390	1,061	8,051	4,381	12,432	6,437	2,854	9,291	22,784
3	1,020	0	1,020	11,724	0	11,724	6,276	0	6,276	19,020
4	801	0	801	10,562	0	10,562	5,482	0	5,482	16,845
5	919	0	919	11,548	0	11,548	7,623	0	7,623	20,090
6	1,059	163	1,222	10,282	1,522	11,804	6,580	0	6,580	19,606
7	1,302	0	1,302	15,464	0	15,464	10,125	0	10,125	26,891
8	1,488	278	1,766	14,257	1,623	15,880	11,891	2,806	14,697	32,343
9	1,857	0	1,857	24,209	0	24,209	12,582	0	12,582	38,648
10	1,161	707	1,868	13,290	5,536	18,826	10,755	2,057	12,812	33,506
11	301	1,084	1,385	3,793	10,296	14,089	1,788	9,732	11,520	26,994
12	1,597	0	1,597	18,528	0	18,528	8,269	191	8,460	28,585
13	1,106	0	1,106	14,542	0	14,542	7,314	0	7,314	22,962
14	1,403	0	1,403	15,265	0	15,265	10,907	0	10,907	27,575
15	1,550	65	1,615	15,077	371	15,448	10,064	0	10,064	27,127
16	796	0	796	12,576	0	12,576	4,704	0	4,704	18,076
17	1,412	0	1,412	17,174	0	17,174	9,872	0	9,872	28,458
18	313	611	924	3,635	7,077	10,712	4,581	5,789	10,370	22,006
19	1,315	145	1,460	16,985	1,210	18,195	11,294	0	11,294	30,949
20	306	1,439	1,745	2,913	11,807	14,720	3,445	7,258	10,703	27,168
21	246	1,139	1,385	3,412	12,044	15,456	2,290	7,406	9,696	26,537
22	121	1,688	1,809	1,346	14,080	15,426	0	9,236	9,236	26,471
23	819	0	819	11,925	0	11,925	6,738	0	6,738	19,482
24	251	1,523	1,774	2,140	11,860	14,000	0	10,716	10,716	26,490
25	0	1,709	1,709	0	14,435	14,435	0	9,460	9,460	25,604
26	0	1,162	1,162	0	9,666	9,666	0	7,165	7,165	17,993
27	853	1,376	2,229	8,768	9,434	18,202	3,331	6,321	9,652	30,083
28	595	833	1,428	5,980	8,462	14,442	3,087	6,452	9,539	25,409
29	906	838	1,744	8,791	7,194	15,985	6,112	3,565	9,677	27,406
30	764	1,034	1,798	5,934	8,732	14,666	4,989	3,452	8,441	24,905
31	409	2,561	2,970	4,025	18,713	22,738	3,408	12,538	15,946	41,654
32	1,104	0	1,104	13,933	0	13,933	7,607	0	7,607	22,644
TL	27,155	18,745	45,900	315,374	158,443	473,817	193,753	106,998	300,751	820,468

9. BASE NUMBER OF TEACHERS

We can determine the number of teachers for a district by dividing the adjusted register of each level by its weighted average maximum pupil-teacher ratio, which we developed earlier, and then adding together the teachers for each of the three levels to arrive at the district total number of teachers. A computation short cut is available to us by use of the workload weighted register. Recall that the workload weights are the required number of teachers per 32.00 students to meet the workload factors for class size and teachers per class, where the 32.00 is the "standard" pupil-teacher ratio. Dividing a district's workload weighted register by the "standard" pupil-teacher ratio gives us the base number of classroom teachers required to meet the workload factors.

DISTRICT d BASE NUMBER OF TEACHERS	=	DISTRICT d WORKLOAD WEIGHTED REGISTERS	÷	"STANDARD" PUPIL-TEACHER RATIO

- To continue with our earlier example of District II, a base of 844 teachers is required for the district.

DISTRICT II BASE NUMBER OF TEACHERS	=	26,994 STUDENTS (WORKLOAD WEIGHTED)	÷	32.00 PUPILS PER TEACHER

= 844 TEACHERS

These 844 teachers are distributed among the six level and Title I combinations as follows:

LEVEL	WORKLOAD WEIGHTED REGISTER	"STANDARD" PUPIL-TEACHER RATIO	BASE NUMBER OF TEACHERS
Kindergarten			
Title I	301	32.00	10
Non-Title I	1,084	32.00	34
Elementary			
Title I	3,793	32.00	119
Non-Title I	10,296	32.00	320
Junior H.S.			
Title I	1,788	32.00	56
Non-Title I	9,732	32.00	305
TOTAL	26,994	32.00	844

Calculations for base teacher requirements for all the districts are shown in Table II-2.

The base number of classroom teachers is the smallest number of teachers a district must hire in order to meet class size and teacher workload requirements. It is impossible to organize a district's schools with fewer teachers.

The base number of teachers assumes that all pupils in a district are organized into one, very large, ideal school. A district requires more than the base number of teachers in order to staff its classes and schools. The number of pupils enrolled at a particular school in a particular grade is not always a whole multiple of the maximum class sizes. For example, a school may have 150 pupils in grade 5. This would most likely mean at least one and possibly five classes below maximum size.

Table II-2

BASE NUMBER OF CLASSROOM TEACHERS

FISCAL YEAR 1975-1976

	KINDERGARTEN		ELEMENTARY		JUNIOR HIGH		
DISTRICT	TITLE I	NON-TITLE I	TITLE I	NON-TITLE I	TITLE I	NON-TITLE I	TOTAL
1	23	0	288	0	194	0	505
2	21	13	250	137	202	90	713
3	32	0	366	0	197	0	595
4	26	0	329	0	172	0	527
5	29	0	360	0	239	0	628
6	34	6	319	48	206	0	613
7	41	0	483	0	317	0	841
8	47	9	444	51	372	88	1,011
9	59	0	755	0	394	0	1,208
10	37	23	412	174	337	65	1,048
11	10	34	119	320	56	305	844
12	50	0	579	0	259	6	894
13	35	0	454	0	229	0	718
14	44	0	477	0	341	0	862
15	49	3	469	12	315	0	848
16	25	0	392	0	148	0	565
17	45	0	536	0	309	0	890
18	10	20	114	219	144	181	688
19	42	5	530	38	353	0	968
20	10	45	92	368	108	227	850
21	8	36	107	375	72	232	830
22	4	53	43	439	0	289	828
23	26	0	372	0	211	0	609
24	8	48	67	370	0	335	828
25	0	54	0	451	0	296	801
26	0	37	0	302	0	224	563
27	27	44	275	292	105	198	941
28	19	27	187	263	97	202	795
29	29	27	272	225	192	112	857
30	24	33	186	272	156	108	779
31	13	81	126	583	107	392	1,302
32	35	0	435	0	238	0	708
TL	862	598	9,838	4,939	6,070	3,350	25,657

There are also situations that allow classes to exceed maximum sizes:

- There may be no available space to permit an additional class.
- Additional classes would be forced on a short time schedule.
- Additional classes would be smaller than half the maximum size.

An example of half classes is when a school has 143 students in grade 5. Four classes of 32 pupils each would take care of 128 pupils. Since the remaining 15 pupils amount to less than half of 32, the maximum size, an additional class need not be organized. The "extra" 15 pupils can be spread among the four classes.

Even if pupils did happen to enroll in convenient groups of 32, educational considerations may require classes larger or smaller than the maximum. Circumstances that require deviations from class size maximums cause "breakage" to occur. To the extent there is breakage, additional teachers are required.

- 5% more than the base number of teachers is required for breakage. This conservative amount is derived from past experience.*

Thus, the total number of teachers required to meet workload factors is equal to the base number plus 5%.

*See "The 1975-1976 Allocation Formulae," Policy Paper No.3, Appendix D, pp. 124-125.

10. WORKLOAD FACTORS AND TEACHER RESOURCE ALLOCATION

In this chapter, we have demonstrated that all pupils do not require identical teacher resources. Pupils must be weighted for teacher resource needs before dollars can be allocated to promote equal educational opportunity for all youth.

The weights are based on differences in workload factors:

- Class size limits.
- Teaching, preparation and administrative period assignments.

With these workload factors, we can compute a district's base number of classes, the smallest number of classes it would have if all pupils were organized into maximum size classes. Because teachers are allowed preparation and administrative assignments, more than one teacher is required for each class. This means that the pupil-teacher ratio must be less than the class size limit. Pupil-teacher ratios are convenient building blocks for workload weights that measure the relative teacher resources required by pupils in different types of schools. The workload weighted register we developed in this chapter is the basis for allocating instructional monies to the thirty-two community school districts. It also is a convenient analytical framework for computing the teacher "savings" due to changes in workloads required by the new Board-UFT contract.

III. TEACHER SAVINGS FROM THE NEW CONTRACT

The 1975-1977 contract between the Board of Education and the United Federation of Teachers changes teacher workload factors and the time that a student spends in school (student workload factors) so that contractual class size limits can be met with fewer teachers than would be required under the 1972-1975 Board-UFT agreement. The "savings" amounts to 3,108 teachers. If the teacher and student workload factors had not been changed, 3,108 more teachers would have been required to maintain contractual class size limits. With a fixed amount of money available to each district, had teacher and student workload factors not changed, districts would have been forced to make draconian cuts in the number of guidance counselors, assistant principals, paraprofessionals, school aides, in after school and summer activities and in special educational programs.

In Chapter II, we explained how teacher workload factors translate into requirements for teachers. From class size limits and teaching, preparation and administrative assignments, we developed maximum pupil-teacher ratios that, in turn, allowed us to establish the number of teachers required by each community school district to meet class size contractual obligations. In this chapter, we use this analytical framework to explain how the "savings" in teachers is computed.

Using the workload conditions called for in the 1975-1977 contract, we determined that for fiscal year 1975-1976, the base number of teachers for the thirty-two community school districts is 25,657 (Table II-2). Following the same logic, but using workload factors from the 1972-1975 contract,* we find that the base number of teachers would have been 28,617. Adding 5% for breakage to both gives us the total number of teachers required to meet class size contractual obligations under the old contract and the new one; their difference is 3,108 teachers, or a 10% "saving." These computations are summarized in the following table.

	1972-1975 CONTRACT	1975-1977 CONTRACT	CHANGE AMOUNT	CHANGE PERCENT
Base Number of Teachers	28,617	25,657	- 2,960	- 10%
5% of Base Number	1,431	1,283	- 148	- 10%
Total Number of Teachers	30,048	26,940	- 3,108	- 10%

If student and teacher workload factors had not been changed, 3,108 additional teachers would have been required to maintain contractual class sizes and teacher workloads. Since community school districts have a fixed amount of money available in their budgets, they would have been forced to make further cuts in the numbers of other personnel in order to release sufficient funds to support the 3,108 additional teachers. The number of guidance counselors, assistant prinicpals, paraprofessionals, per session

*"The 1975-1976 Allocation Formulae," Policy Paper No. 3, Chapter IV.

teachers and school aides would have been reduced beyond their already educationally disastrous levels. Regular and special educational programs and after school centers and continuing education programs would have had to be further curtailed.

Recall that the new contract includes two changes that generate the "savings." The instructional week is shortened two periods a week and teachers in Title I schools are assigned two more teaching periods and two fewer preparation periods. How much of the "savings" of 3,108 teachers is due to each change? We can answer this question by computing the base number of teachers required by each of the two hypothetical workload factors. The impact of each of these changes is shown below.

	BASE NUMBER OF TEACHERS	5% OF BASE	TOTAL NUMBER OF TEACHERS
1972-1975 Contract	28,617	1,431	30,048
1975-1977 Contract	25,657	1,283	26,940
DIFFERENCE	2,960	148	3,108
Shortened Week	1,726	86	1,812
Title I Preparation Periods	1,234	62	1,296

If the instructional week for all schools had not been shortened, 1,812 more teachers would have been needed to meet class size and teacher workload requirements. If two preparation periods had not been converted into teaching periods for teachers in Title I schools, 1,296 more teachers would have been needed.

More than half (58%) of the "savings" is due to the shortened week, which affects all schools. Converting preparation periods into teaching periods affects only Title I schools.

Another way to measure the "savings" in teachers is in terms of class size. We do this by calculating the class size assuming no workload changes or increase in the base number of teachers. How big would classes have to be under these conditions? The answer is tabulated below.

	MAXIMUM CLASS SIZE			
	1972-1975 CONTRACT	HYPOTHETICAL 1975-1977 CONTRACT	DIFFERENCE NUMBER	DIFFERENCE PERCENT
Kindergarten				
Title I	50	56	6	12%
Non-Title I	50	56	6	12%
Elementary				
Title I	32	36	4	13%
Non-Title I	32	36	4	13%
Junior High				
Title I	30	34	4	13%
Non-Title I	33	37	4	12%

Given current budgetary limitations, class size maximums would necessarily have increased by six for kindergarten students (three per session) and four for elementary and junior high school students if the workload factors had not changed. In a sense, smaller classes were "bought" with greater teacher workloads and reduced student instruction time.

IV. MODULE 2: INSTRUCTIONAL SERVICES

The formulae for allocating instructional services monies are explained in great detail in "The 1975-1976 Allocation Formulae," Policy Paper No. 3. In this chapter, we present the revised allocation for Module 2A that reflects all the changes discussed earlier:

- Workload factors from the 1975-1977 Board-UFT agreement (Chapter II).
- Changes from Non-Title I to Title I status of several schools (Appendix A).
- Average teacher salaries that reflect massive layoffs of teachers (Appendix C).

The most dominant change is the result of the new workload factors. Since they "favor" Non-Title I schools, the revised allocations redistribute the Module 2A monies toward Non-Title I schools. This shift is necessary in order to promote resource equalization (see Chapter I) among all thirty-two community school districts. The tables in this chapter supersede those in Policy Paper No. 3 and the Addendum of August 15, 1975.

Table IV-1

MODULE 2A

BASIC INSTRUCTIONAL SERVICES ALLOCATION

FISCAL YEAR 1975-1976

DISTRICT	BASE ALLOCATION	SUPPORTING PERCENT ALLOCATION	OCCASIONAL ABSENCE ALLOCATION	SUPPORTING PER CAPITA ALLOCATION	TOTAL BASIC INSTRUCTION ALLOCATION*
1	$ 9,025,360	$ 1,245,500	$ 277,750	$ 1,589,246	$12,137,856
2	13,040,770	1,799,626	392,150	2,241,095	17,473,641
3	10,455,935	1,442,919	327,250	1,870,858	14,096,962
4	9,323,157	1,286,596	289,850	1,656,919	12,556,522
5	11,027,680	1,521,820	345,400	1,976,106	14,871,006
6	10,704,819	1,477,265	337,150	1,928,499	14,447,733
7	14,639,287	2,020,222	462,550	2,645,071	19,767,130
8	17,757,204	2,450,494	556,050	3,181,344	23,945,092
9	20,267,824	2,796,960	664,400	3,801,521	27,530,705
10	18,607,240	2,567,799	576,400	3,295,740	25,047,179
11	15,305,096	2,112,103	464,200	2,655,202	20,536,601
12	15,674,502	2,163,081	491,700	2,811,697	21,140,980
13	12,189,486	1,682,149	394,900	2,258,604	16,525,139
14	15,216,024	2,099,811	474,100	2,712,351	20,502,286
15	14,820,496	2,045,228	466,400	2,668,284	20,000,408
16	9,450,190	1,304,126	310,750	1,778,004	12,843,070
17	15,065,920	2,079,097	489,500	2,799,205	20,433,722
18	12,246,400	1,690,003	378,400	2,164,569	16,479,372
19	16,849,976	2,325,297	532,400	3,044,227	22,751,900
20	15,176,750	2,094,391	467,500	2,672,317	20,410,958
21	14,988,140	2,068,363	456,500	2,610,250	20,123,253
22	15,314,688	2,113,427	455,400	2,603,758	20,487,273
23	10,554,579	1,456,532	334,950	1,916,302	14,262,363
24	14,630,760	2,019,045	455,400	2,605,627	19,710,832
25	14,947,461	2,062,750	440,550	2,518,478	19,969,239
26	10,643,515	1,468,805	309,650	1,769,840	14,191,810
27	17,166,663	2,368,999	517,550	2,959,044	23,012,256
28	14,503,185	2,001,440	437,250	2,499,297	19,441,172
29	15,330,873	2,115,660	471,350	2,695,728	20,613,611
30	13,972,144	1,928,156	428,450	2,449,723	18,778,473
31	23,589,636	3,255,370	716,100	4,097,200	31,658,306
32	12,048,036	1,662,629	389,400	2,227,325	16,327,390
TL	$454,533,796	$ 62,725,663	$14,111,350	$80,703,431	$612,074,240

*"Pure" formula allocation not adjusted for 2% limit on hold-harmless: Districts 1, 5, 7, 8, 12, 13, 16, 23, 28.

Table IV-2

DISTRICTS AFFECTED BY 2% LIMIT ON HOLD-HARMLESS FOR MODULE 2A

FISCAL YEAR 1975-76

DISTRICT	1975-1976 MODULE 2A ALLOCATION BASED ON "PROJECTED" OCT. '75 REG.	"PROJECTED" ALLOCATION PLUS 2%	1975-1976 MODULE 2A ALLOCATION BASED ON AUDITED OCT. '74 REG.	AMOUNT WITHHELD BY LIMITING ALLOCATION TO "PROJECTED" PLUS 2%
1	$11,740,561	$11,975,372	$12,137,856	$ 162,484
5	14,091,387	14,373,215	14,871,006	497,791
7	18,898,929	19,276,908	19,767,130	490,222
8	23,386,730	23,854,465	23,945,092	90,627
12	19,803,246	20,199,311	21,140,980	941,669
13	16,153,047	16,476,108	16,525,139	49,031
16	12,450,159	12,699,162	12,843,070	143,908
23	13,392,541	13,660,392	14,262,363	601,971
28	18,909,469	19,287,658	19,441,172	153,514
TOTAL				$3,131,217

76

77

Table IV-3

MODULE 2

INSTRUCTIONAL SERVICES

FISCAL YEAR 1975-1976

DISTRICT	SPECIAL NEEDS ALLOCATION	BASIC INSTRUCTION* ALLOCATION	TOTAL ALLOCATION
1	$ 1,416,258	$11,975,372	$ 13,391,630
2	1,323,197	17,473,641	18,796,838
3	1,691,902	14,096,962	15,788,864
4	1,698,979	12,556,522	14,255,501
5	1,786,024	14,373,215	16,159,239
6	1,574,249	14,447,733	16,021,982
7	2,675,410	19,276,908	21,952,318
8	2,494,065	23,854,465	26,348,530
9	3,539,141	27,530,705	31,069,846
10	2,539,357	25,047,179	27,586,536
11	1,555,673	20,536,601	22,092,274
12	2,956,185	20,199,311	23,155,496
13	2,164,460	16,476,108	18,640,568
14	2,608,002	20,502,286	23,110,288
15	2,484,865	20,000,408	22,485,273
16	1,709,417	12,699,162	14,408,579
17	2,409,496	20,433,722	22,843,218
18	1,130,352	16,479,372	17,609,724
19	3,020,584	22,751,900	25,772,484
20	1,543,111	20,410,958	21,954,069
21	1,340,712	20,123,253	21,463,965
22	1,039,061	20,487,273	21,526,334
23	1,938,531	13,660,392	15,598,923
24	1,518,342	19,710,832	21,229,174
25	830,294	19,969,239	20,799,533
26	521,212	14,191,810	14,713,022
27	2,011,599	23,012,256	25,023,855
28	1,566,111	19,287,658	20,853,769
29	1,887,224	20,613,611	22,500,835
30	1,590,880	18,778,473	20,369,353
31	1,671,202	31,658,306	33,329,508
32	2,298,920	16,327,390	18,626,310
SUB-TL	$60,534,815	$608,943,023	$669,477,838
HOLD-HARMLESS ADJUSTMENT		3,131,217	3,131,217
TOTAL		$612,074,240	$672,609,055

*Adjusted for 2% limit on hold-harmless: Districts 1, 5, 7, 8, 12, 13, 16, 23, 28.

V. MODULE 4B: FUNDS FOR CAPITAL NOTE ITEMS

Module 4, Special Formula Funds, is made up of two separate modules:

- Module 4A: New York State Textbook Program.
- Module 4B: Funds for Capital Note Items.

The allocation formula for Module 4B is described in detail in "The 1975-1976 Allocation Formulae," Policy Paper No. 3, Chapter VII. The allocation is based on the workload weighted register, which we developed in Chapter II. The 1975-1977 Board-UFT contract has changed workload factors and the workload weighted register so that the Module 4B allocation must be revised. The allocation in this document, Table V-1, supersedes Policy Paper No. 3 and the Addendum of August 15, 1975.

Table V-I

MODULE 4B

CAPITAL NOTES ALLOCATION

FISCAL YEAR 1975-1976

DISTRICT	WORKLOAD WEIGHTED REGISTER	TOTAL ALLOCATION
1	16,157	$135,304
2	22,784	190,801
3	19,020	159,280
4	16,845	141,066
5	20,090	168,240
6	19,606	164,187
7	26,891	225,194
8	32,343	270,851
9	38,648	323,651
10	33,506	280,591
11	26,994	226,057
12	28,585	239,381
13	22,962	192,292
14	27,575	230,922
15	27,127	227,171
16	18,076	151,375
17	28,458	238,317
18	22,006	184,286
19	30,949	259,177
20	27,168	227,514
21	26,537	222,230
22	26,471	221,677
23	19,482	163,149
24	26,490	221,836
25	25,604	214,417
26	17,993	150,679
27	30,083	251,925
28	25,409	212,784
29	27,406	229,507
30	24,905	208,563
31	41,654	348,825
32	22,644	189,629
TL	820,468	$6,870,878

VI. MODULE 5: SPECIAL PURPOSES

Module 5 Appropriations, categorized in terms of their intended purposes, for fiscal year 1975-1976 are tabulated in Table VI-1. Module 5 monies are designated for special purposes:

- Module 5A, Special Purpose Funds, is managed centrally.
- Module 5B, Special Purpose Reserve, is allocated to the community school districts.

I. MODULE 5A: SPECIAL PURPOSE FUNDS

Module 5A, Special Purpose Funds, managed centrally, provides special programs and services to all community school districts.

A. School Lunch: $77,743,512

The Bureau of School Lunches provides lunches for children in all schools. Districts have the option of operating their own lunch program with funds allocated for this purpose. In 1974-1975, with the exception of District 1, all district school lunch programs were centrally managed.

B. Repair and Maintenance: $24,852,422

The Division of School Buildings provides personnel and materials for repair and maintenance jobs such as replacing windows, painting, restoring and repairing buildings (roofing, plumbing, boilers), correcting code violations (health, fire, building), installing equipment (chalkboards, window guards, lighting), landscaping, and exterminating. The funds available for each district are based on district square footage and the previous year's cost for vandalism.

Table VI-I

MODULE 5, SPECIAL PURPOSES

FISCAL YEAR 1975-1976

MODULE 5A: SPECIAL PURPOSE FUNDS	
School Lunch	$ 77,743,512
Repair and Maintenance	24,852,422
Rentals	5,389,345
Paraprofessional Training Program	185,945
Borough-Wide Music Program	106,307
City-Wide Awards	2,500
Sub-Total Module 5A	$108,280,031
MODULE 5B: SPECIAL PURPOSE RESERVE	
Sabbatical Leave Coverage	$ 12,250,446
Leave in Lieu of Sabbaticals	2,427,471
Prep-Periods (Special Education)	6,000,000
Register Increase	4,500,000
Salaries - Properly Excessed Personnel	600,000
Terminal Leave	700,000
Theft and Vandalism	300,000
OTPS New Schools	536,600
Legal Counsel	50,000
Bilingual Education	6,800,000
Chancellor's Contingency Fund for Educational Parks and Integration Programs	1,000,000
Reserve for Short-falls in Above Categories	1,000,000
Sub-Total Module 5B	$ 36,164,517
TOTAL MODULE 5	$144,444,548

C. Rentals: $5,389,345

Where overcrowding exists, additional space can be rented. The Office of Educational Facilities Planning regulates leasing of additional space.

D. Paraprofessional Training Program: $185,945

The operating costs of the paraprofessional training program are included in Module 5. Stipend payments to trainees are included in Module 6, Fringe Benefits.

E. Borough-Wide Music Program: $106,507

The Bureau of Music conducts Saturday morning vocal and instrumental programs in districts. Students from all districts may participate.

F. City-Wide Awards: $2,500

Medals and awards are presented by the Bureau of Health and Physical Education for interdistrict competitions.

2. MODULE 5B: SPECIAL PURPOSE RESERVE

Module 5B, Special Purpose Reserve, allocates funds to districts for specific costs.

A. Sabbatical Leave Coverage: $12,250,446
Terminal Leave Coverage: $700,000

Replacement personnel are required when a principal, assistant principal, teacher, guidance counselor or school secretary are on a sabbatical or terminal leave. Funds are allocated to cover these

replacement costs. A district's allocation is based on the number and type of personnel on leave and the district average salary.

B. Leave in Lieu of Sabbaticals: $2,427,471

Principals, assistant principals and other supervisors who forgo their sabbatical leave at retirement go on a "Leave in Lieu of Sabbatical Leave" (LILU). Districts are allocated funds to cover the cost of supervisors on leave in lieu of sabbatical leave. The allocation depends upon the supervisor's salary and duration of leave.

C. Preparation Period Coverage For Special Education Classes: $6,000,000

Special purpose funds are provided to districts for coverage of special education classes during the special education teacher's preparation period. The allocation is based on the number of additional teachers required and the district average salary.

D. Register Increase: $4,500,000

Districts that have an increase in audited registers from October 31, 1974, to October 31, 1975, receive a special purpose allocation based on the 1975-1976 Module 2A formula. This allocation compensates for the use of the October 31, 1974, register for the 1975-1976 Module 2A allocation.

E. Salaries of Properly Excessed Personnel: $600,000

Salaries of personnel properly declared in excess from a district are paid out of this special purpose fund until they are reassigned or terminated.

F. Theft and Vandalism: $300,000

Special purpose funds are allocated for the replacement of stolen or vandalized instructional equipment.

G. Other Than Personal Service - New Schools: $536,600

This special purpose allocation provides funds for purchasing instructional supplies for opening new schools.

H. Legal Counsel: $50,000

A district is reimbursed for the cost of legal counsel services (subject to review for fair and reasonable costs) if the Corporation Counsel cannot perform these services and rules that the district should not be charged for contracting such services.

I. Bilingual Education: $6,800,100

Special purpose funds are allocated to provide instructional services unique to the education of pupils with difficulty in the English language. This covers the costs of bilingual programs including bilingual teachers, teachers of English as a second

language and paraprofessionals. Also provided are supplies, textbooks, testing, and other than personal service items required by such programs. A district's allocation is based on the number of pupils with English language disabilities.

J. Chancellor's Contingency Fund for Educational Parks and Integration Programs: $1,000,000

The Chancellor's Contingency Fund supports new educational parks, such as the North East Bronx Educational Park in District 11 and the East New York Educational Complex in District 19. The fund also provides for special services required by schools that are paired to promote integration.

Appendix A

THE ADJUSTED REGISTER

The adjusted pupil register is the primary basis for allocating funds to the community school districts. The fiscal year 1975-1976 allocation formulae used the reported October 31, 1974, pupil register adjusted for:

- Long term absences.
- Pupils in Special Education classes, who are supported by centrally administered funds.
- Pupils attending school out of district.
- Unusual register changes after October 31, 1974.
- Pupils formerly in Special Education classes for emotionally handicapped children, who are supported by centrally administered funds.
- Eighth grade graduates of intermediate schools.

Table A-1 lists the adjusted register broken down by level and by Title I status. Table A-2 shows the register changes between October 1973 and October 1974.

Table A-1

ADJUSTED REGISTER: OCTOBER 1974, FISCAL YEAR 1975-1976

	KINDERGARTEN		ELEMENTARY		JUNIOR HIGH		
DISTRICT	TITLE I	NON-TITLE I	TITLE I	NON-TITLE I	TITLE I	NON-TITLE I	TOTAL
1	1,075	0	8,889	0	4,277	0	14,241
2	1,016	609	7,741	4,381	4,439	2,230	20,416
3	1,545	0	11,273	0	4,328	0	17,146
4	1,214	0	10,156	0	3,781	0	15,151
5	1,392	0	11,104	0	5,257	0	17,753
6	1,604	254	9,887	1,522	4,538	0	17,805
7	1,972	0	14,869	0	6,983	0	23,824
8	2,255	434	13,709	1,623	8,201	2,192	28,414
9	2,814	0	23,278	0	8,677	0	34,769
10	1,759	1,105	12,779	5,536	7,417	1,607	30,203
11	456	1,694	3,647	10,296	1,233	7,603	24,929
12	2,420	0	17,815	0	5,703	149	26,087
13	1,676	0	13,983	0	5,044	0	20,703
14	2,125	0	14,678	0	7,522	0	24,325
15	2,349	101	14,497	371	6,941	0	24,259
16	1,206	0	12,092	0	3,244	0	16,542
17	2,139	0	16,513	0	6,808	0	25,460
18	474	955	3,495	7,077	3,159	4,523	19,683
19	1,992	226	16,332	1,210	7,789	0	27,549
20	464	2,248	2,801	11,807	2,376	5,670	25,366
21	372	1,780	3,281	12,044	1,579	5,786	24,842
22	184	2,638	1,294	14,080	0	7,216	25,412
23	1,241	0	11,466	0	4,647	0	17,354
24	381	2,379	2,058	11,860	0	8,372	25,050
25	0	2,671	0	14,435	0	7,391	24,497
26	0	1,816	0	9,666	0	5,598	17,080
27	1,293	2,150	8,431	9,434	2,297	4,938	28,543
28	902	1,302	5,750	8,462	2,129	5,041	23,586
29	1,373	1,310	8,453	7,194	4,215	2,785	25,330
30	1,158	1,615	5,706	8,732	3,441	2,697	23,349
31	619	4,002	3,870	18,713	2,350	9,795	39,349
32	1,673	0	13,397	0	5,246	0	20,316
TL	41,143	29,289	303,244	158,443	133,621	83,593	749,333

Table A-2

REGISTER CHANGES: OCTOBER 1973 TO OCTOBER 1974

DISTRICT	KINDERGARTEN TITLE I	KINDERGARTEN NON-TITLE I	KINDERGARTEN TOTAL	ELEMENTARY TITLE I	ELEMENTARY NON-TITLE I	ELEMENTARY TOTAL	JUNIOR HIGH TITLE I	JUNIOR HIGH NON-TITLE I	JUNIOR HIGH TOTAL	TOTAL CHANGE
1	- 28	+ 0	- 28	- 439	+ 0	- 439	- 159	+ 0	- 159	- 626
2	- 106	+ 47	- 59	- 39	+ 150	+ 111	- 147	+ 156	+ 9	+ 61
3	+ 24	+ 0	+ 24	- 386	+ 0	- 386	- 34	+ 0	- 34	- 396
4	+ 81	+ 0	+ 81	- 357	+ 0	- 357	- 19	+ 0	- 19	- 295
5	- 13	+ 0	- 13	- 757	+ 0	- 767	- 245	+ 0	- 245	- 1,025
6	+ 4	- 14	- 10	+ 137	- 70	+ 67	+ 187	+ 0	+ 187	+ 244
7	- 65	+ 0	- 65	- 1,660	+ 0	- 1,660	+ 174	+ 0	+ 174	- 1,551
8	- 73	+ 18	- 55	- 1,223	- 209	- 1,432	- 20	+ 32	+ 12	- 1,475
9	- 306	+ 0	- 306	- 994	+ 0	- 994	+ 1,508	+ 0	+ 1,508	+ 208
10	+ 78	+ 88	+ 166	+ 1,385	+ 14	+ 1,399	+ 193	+ 57	+ 250	+ 1,815
11	- 44	- 107	- 151	- 40	- 332	- 372	+ 16	- 152	- 136	- 659
12	- 221	+ 0	- 221	- 2,249	+ 0	- 2,249	- 154	+ 149	- 5	- 2,475
13	- 79	+ 0	- 79	- 519	+ 0	- 519	- 10	+ 0	- 10	- 608
14	- 93	+ 0	- 93	- 964	+ 0	- 964	+ 237	+ 0	+ 237	- 820
15	- 102	+ 7	- 95	- 23	+ 7	- 16	+ 131	+ 0	+ 131	+ 20
16	- 115	+ 0	- 115	- 562	+ 0	- 562	+ 97	+ 0	+ 97	- 580
17	- 30	+ 0	- 30	- 100	+ 0	- 100	+ 114	+ 0	+ 114	- 16
18	+ 40	+ 60	+ 100	- 78	- 3	- 81	+ 120	- 26	+ 94	+ 113
19	- 5	+ 6	+ 1	- 722	+ 30	- 692	- 196	+ 0	- 196	- 887
20	- 50	- 13	- 63	- 44	+ 20	- 24	- 107	+ 43	- 64	- 151
21	+ 35	- 54	- 19	+ 368	- 218	+ 150	- 277	- 339	- 616	- 485
22	- 6	- 178	- 184	+ 41	- 75	- 34	+ 0	- 251	- 251	- 469
23	- 214	+ 0	- 214	- 763	+ 0	- 763	- 283	+ 0	- 283	- 1,260
24	- 30	- 22	- 52	+ 179	+ 83	+ 262	+ 0	+ 832	+ 832	+ 1,042
25	+ 0	- 43	- 43	+ 0	- 175	- 175	+ 0	- 110	- 110	- 328
26	+ 0	+ 21	+ 21	+ 0	- 534	- 534	+ 0	- 243	- 243	- 756
27	- 8	+ 52	+ 44	+ 182	- 84	+ 98	- 149	+ 209	+ 60	+ 202
28	- 17	- 61	- 78	- 225	- 285	- 510	- 62	- 271	- 333	- 921
29	- 151	+ 134	- 17	- 44	+ 12	- 32	- 327	+ 135	- 192	- 241
30	+ 96	+ 86	+ 182	- 183	+ 131	- 52	+ 190	+ 139	+ 329	+ 459
31	- 50	+ 117	+ 67	- 98	+ 184	+ 86	+ 26	+ 244	+ 270	+ 423
32	+ 76	+ 0	+ 76	- 237	+ 0	- 237	- 58	+ 0	- 58	- 219
TL	- 1,372	+ 144	- 1,228	- 10,424	- 1,354	- 11,778	+ 746	+ 604	+ 1,350	- 11,656

APPENDIX B

PROJECTED OCTOBER 1975 REGISTER

The projected October 1975 adjusted register for each district is based on the October register for the years 1972, 1973, and 1974. Registers of each district are projected for the following six categories (Table B-1):

- Kindergarten Title I.
- Kindergarten Non-Title I.
- Elementary School Title I.
- Elementary School Non-Title I.
- Junior High School Title I.
- Junior High School Non-Title I.

The projections are based on judgemental extrapolations of past trends rather than sophisticated statistical methods. Additional information is incorporated into each district's projections:

- The impact of new housing.
- Changes in Title I status of schools.
- Open enrollment agreements between districts.

Table B-2 lists the projected changes from October 1974 to October 1975.

Table B-1

PROJECTED ADJUSTED REGISTER

OCTOBER 1975

	KINDERGARTEN		ELEMENTARY		JUNIOR HIGH		
DISTRICT	TITLE I	NON-TITLE I	TITLE I	NON-TITLE I	TITLE I	NON-TITLE I	TOTAL
1	969	0	8,436	0	4,129	0	13,534
2	972	624	7,671	4,487	4,352	2,472	20,578
3	1,551	0	10,737	0	4,345	0	16,633
4	1,249	0	9,824	0	3,890	0	14,963
5	1,264	0	10,316	0	4,970	0	16,550
6	1.604	229	9,887	1,522	4,538	0	17,780
7	1,801	0	13,436	0	7,034	0	22,271
8	2,260	435	13,113	1,417	7,926	2,213	27,364
9	2,625	0	22,862	0	9,231	0	34,718
10	1,762	1,108	13,875	5,551	7,434	1,611	31,341
11	476	1,538	3,867	10,149	1,233	7,312	24,575
12	2,163	0	15,852	0	5,860	0	23,875
13	1,491	0	13,373	0	4,991	0	19,855
14	1,952	0	14,002	0	7,738	0	23,692
15	2,211	109	14,497	371	6,941	0	24,129
16	994	0	11,445	0	3,244	0	15,683
17	2,112	0	16,537	0	6,932	0	25,581
18	474	955	3,417	7,074	3,304	4,480	19,704
19	1,936	245	16,459	1,348	7,949	0	27,937
20	436	2,179	2,706	11,807	2,293	5,670	25,091
21	336	1,787	3,441	11,940	1,585	5,500	24,589
22	184	2,638	1,294	14,005	0	6,817	24,938
23	940	0	10,646	0	4,376	0	15,962
24	381	2,350	2,193	12,107	0	8,863	25,894
25	0	2,592	0	14,289	0	7,242	24,123
26	0	1,925	0	9,264	0	5,457	16,646
27	1,204	2,171	8,196	9,543	2,169	4,986	28,269
28	881	1,144	5,500	8,231	2,074	4,787	22,617
29	1,304	1,300	8,353	7,179	4,216	2,881	25,233
30	1,291	1,616	5,525	8,867	3,547	2,794	23,640
31	532	4,019	3,788	18,980	2,350	10,092	39,761
32	1,673	0	13,265	0	5,202	0	20,140
TL	39,028	28,964	294,513	158,131	133,853	83,177	737,666

Table B-2

REGISTER CHANGES: OCTOBER 1974 TO PROJECTED OCTOBER 1975

DISTRICT	KINDERGARTEN TITLE I	KINDERGARTEN NON-TITLE I	KINDERGARTEN TOTAL	ELEMENTARY TITLE I	ELEMENTARY NON-TITLE I	ELEMENTARY TOTAL	JUNIOR HIGH TITLE I	JUNIOR HIGH NON-TITLE I	JUNIOR HIGH TOTAL	TOTAL CHANGE
1	- 106	+ 0	- 106	- 453	+ 0	- 453	- 148	+ 0	- 148	- 707
2	- 44	+ 15	- 29	- 70	+ 66	+ 36	- 87	+ 242	+ 155	+ 162
3	+ 6	+ 0	+ 6	- 536	+ 0	- 536	+ 17	+ 0	+ 17	- 513
4	+ 35	+ 0	+ 35	- 332	+ 0	- 332	+ 109	+ 0	+ 109	- 188
5	- 128	+ 0	- 128	- 788	+ 0	- 788	- 287	+ 0	- 287	- 1,203
6	+ 0	- 25	- 25	+ 0	+ 0	+ 0	+ 0	+ 0	+ 0	- 25
7	- 471	+ 0	- 171	- 1,433	+ 0	- 1,433	+ 51	+ 0	+ 51	- 1,553
8	+ 5	+ 1	+ 6	- 596	- 206	- 802	- 275	+ 21	- 254	- 1,050
9	- 189	+ 0	- 189	- 416	+ 0	- 416	+ 554	+ 0	+ 554	- 51
10	+ 3	+ 3	+ 6	+ 1,096	+ 15	+ 1,111	+ 17	+ 4	+ 21	+ 1,138
11	+ 20	- 156	- 136	+ 220	- 147	+ 73	+ 0	- 291	- 291	- 354
12	- 257	+ 0	- 257	- 1,963	+ 0	- 1,963	+ 157	- 149	+ 8	- 2,212
13	- 185	+ 0	- 185	- 610	+ 0	- 610	- 53	+ 0	- 53	- 848
14	- 173	+ 0	- 173	- 676	+ 0	- 676	+ 216	+ 0	+ 216	- 633
15	- 158	+ 8	- 130	+ 0	+ 0	+ 0	+ 0	+ 0	+ 0	- 130
16	- 212	+ 0	- 212	- 647	+ 0	- 647	+ 0	+ 0	+ 0	- 859
17	- 27	+ 0	- 27	+ 24	+ 0	+ 24	+ 124	+ 0	+ 124	+ 121
18	+ 0	+ 0	+ 0	- 78	- 3	- 81	+ 145	- 43	+ 102	+ 21
19	- 56	+ 19	- 37	+ 127	+ 138	+ 265	+ 160	+ 0	+ 160	+ 388
20	- 28	- 69	- 97	- 95	+ 0	- 95	- 83	+ 0	- 83	- 275
21	- 36	+ 7	- 29	+ 160	- 104	+ 56	+ 6	- 286	- 280	- 253
22	+ 0	+ 0	+ 0	+ 0	- 75	- 75	+ 0	- 399	- 399	- 474
23	- 301	+ 0	- 301	- 820	+ 0	- 820	- 271	+ 0	- 271	- 1,392
24	+ 0	- 29	- 29	+ 135	+ 247	+ 382	+ 0	+ 491	+ 491	+ 844
25	+ 0	- 79	- 79	+ 0	- 146	- 146	+ 0	- 149	- 149	- 374
26	+ 0	+ 109	+ 109	+ 0	- 402	- 402	+ 0	- 141	- 141	- 434
27	- 89	+ 21	- 68	- 235	+ 109	- 126	- 128	+ 48	- 80	- 274
28	- 21	- 158	- 179	- 250	- 231	- 481	- 55	- 254	- 309	- 969
29	- 69	- 10	- 79	- 100	- 15	- 115	+ 1	+ 96	+ 97	- 97
30	+ 133	+ 1	+ 134	- 181	+ 135	- 46	+ 106	+ 97	+ 203	+ 291
31	- 87	+ 17	- 70	- 82	+ 267	+ 185	+ 0	+ 297	+ 297	+ 412
32	+ 0	+ 0	+ 0	- 132	+ 0	- 132	- 44	+ 0	- 44	- 176
TL	- 2,115	- 325	- 2,440	- 8,731	- 312	- 9,043	+ 232	- 416	- 184	- 11,667

APPENDIX C

THE AVERAGE TEACHER SALARY

The average teacher salary is computed from the Board of Education R-740 teacher payroll file, which is used for producing the actual payroll. The use of the June 1975 average teacher salary reflects the most current variation among community school districts. This amounts to incorporating an adjustment for teacher salary differences.

Because of the severe $80 million cut in funds for instructional services, thousands of teachers must be fired. This reality is incorporated into the allocation formulae by computing the average teacher salary without two groups of teachers:

- All full-time substitute teachers.
- All regularly appointed teachers on steps 1A through 3B.

Only regularly appointed teachers on steps 4A through 8B are included. For each district, the total of the annual salaries as of June 1975 of these teachers is divided by the number of teachers.

$$\text{DISTRICT d AVERAGE TEACHER SALARY} = \frac{\text{TOTAL ANNUAL SALARIES}}{\text{TOTAL NUMBER OF POSITIONS}}$$

- For example, District 11 has an average teacher salary of $18,134.

$$\text{DISTRICT 11 AVERAGE TEACHER SALARY} = \frac{\$17,825,537}{983 \text{ POSITIONS}}$$

$$= \$18,134$$

Table C-1 lists the average teacher salary for each district.

TABLE C-1

AVERAGE TEACHER SALARY

JUNE 1975

DISTRICT	NUMBER OF POSITIONS*	ANNUAL SALARIES	AVERAGE SALARY
1	619	$ 11,063,059	$17,872
2	860	15,729,274	18,290
3	708	12,441,661	17,573
4	701	12,401,622	17,691
5	805	14,135,617	17,560
6	688	12,014,477	17,463
7	1,031	17,946,440	17,407
8	1,205	21,164,885	17,564
9	1,181	19,815,230	16,778
10	1,089	19,335,662	17,755
11	983	17,825,537	18,134
12	1,171	20,530,924	17,533
13	830	14,091,092	16,977
14	1,043	18,410,587	17,652
15	1,006	17,582,082	17,477
16	614	10,269,992	16,726
17	896	15,167,165	16,928
18	738	13,136,742	17,800
19	1,147	19,965,635	17,407
20	960	17,141,112	17,855
21	989	17,859,172	18,058
22	947	17,515,780	18,496
23	760	13,171,875	17,331
24	853	15,072,560	17,670
25	926	17,280,285	18,661
26	702	13,271,095	18,905
27	1,033	18,845,427	18,243
28	966	17,622,665	18,243
29	985	17,620,650	17,889
30	813	14,582,212	17,936
31	1,475	26,724,119	18,118
32	772	13,137,360	17,017
TOTAL	29,496	$522,871,995	$17,727

*Includes regularly appointed teachers on steps 4A through 8S. Substitute teachers are excluded. Teachers at step 3B and below are excluded.

Source: June 1975 R740 Position Status Report.

END

TABLE C-1

AVERAGE TEACHER SALARY

JUNE 1975

DISTRICT	NUMBER OF POSITIONS*	ANNUAL SALARIES	AVERAGE SALARY
1	619	$ 11,063,059	$17,872
2	860	15,729,274	18,290
3	708	12,441,661	17,573
4	701	12,401,622	17,691
5	805	14,135,617	17,560
6	688	12,014,477	17,463
7	1,031	17,946,440	17,407
8	1,205	21,164,885	17,564
9	1,181	19,815,230	16,778
10	1,089	19,335,662	17,755
11	983	17,825,537	18,134
12	1,171	20,530,924	17,533
13	830	14,091,092	16,977
14	1,043	18,410,587	17,652
15	1,006	17,582,082	17,477
16	614	10,269,992	16,726
17	896	15,167,165	16,928
18	738	13,136,742	17,800
19	1,147	19,965,635	17,407
20	960	17,141,112	17,855
21	989	17,859,172	18,058
22	947	17,515,780	18,496
23	760	13,171,875	17,331
24	853	15,072,560	17,670
25	926	17,280,285	18,661
26	702	13,271,095	18,905
27	1,033	18,845,427	18,243
28	966	17,622,665	18,243
29	985	17,620,650	17,889
30	813	14,582,212	17,936
31	1,475	26,724,119	18,118
32	772	13,137,360	17,017
TOTAL	29,496	$522,871,995	$17,727

*Includes regularly appointed teachers on steps 4A through 8B. Substitute teachers are excluded. Teachers at step 3B and below are excluded.

Source: June 1975 R740 Position Status Report.